MedicaSoft

Feature Specification and User Guide, Part 1 User Guide

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Introduction

MedicaSoft's HealthCenter Personal Health Record (PHR) provides the core functions for the Florida Department of Health PHR. During the FDOH PHR implementation, MedicaSoft tailors HealthCenter to meet FDOH's detailed requirements and integrates the PHR into the Health Information Exchange (HIE) environment. Specifically, the User Experience Finalization task in the Implementation Plan provides an opportunity for MedicaSoft and FDOH to discuss details of FDOH's requirements and the HIE environment. This document captures the detailed requirements as discussed by MedicaSoft and FDOH.

Signatures

_____	_____
Michael Cragg, FDOH Project Manager	Date
_____	_____
Mary Agens, Executive Nursing Director	Date
_____	_____
Ashley George, MedicaSoft Project Manager	Date

0. Overview

The Florida Department of Health (FDOH) has implemented Florida Health Connect, a personal health record (PHR) for the clients of FDOH. People use Florida Health Connect to manage all of their health information, from all providers, in one place. In addition to self-managing their health information, they can allow caretakers, and family members to manage health data on their behalf.

This document describes the features provided by Florida Health Connect. It also serves as a user guide covering all basic functions of Florida Health Connect. Help Desk personnel will find it invaluable for answering questions from end users. The document provides an overview of each function of the platform, along with use cases that describe issues that a user may encounter.

The data in a user's Florida Health Connect account may come from providers, pharmacies, labs, and even smart health monitors and wearable devices. Information exchanged by FDOH member providers arrives in the user's account automatically. Additionally, the system lets users request health records from out-of-FDOH-network providers. Users may also manage appointments, to-do lists, medications, exchange secure messages with their providers, and find out more information about specific medical conditions and health maintenance.

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I. User Features

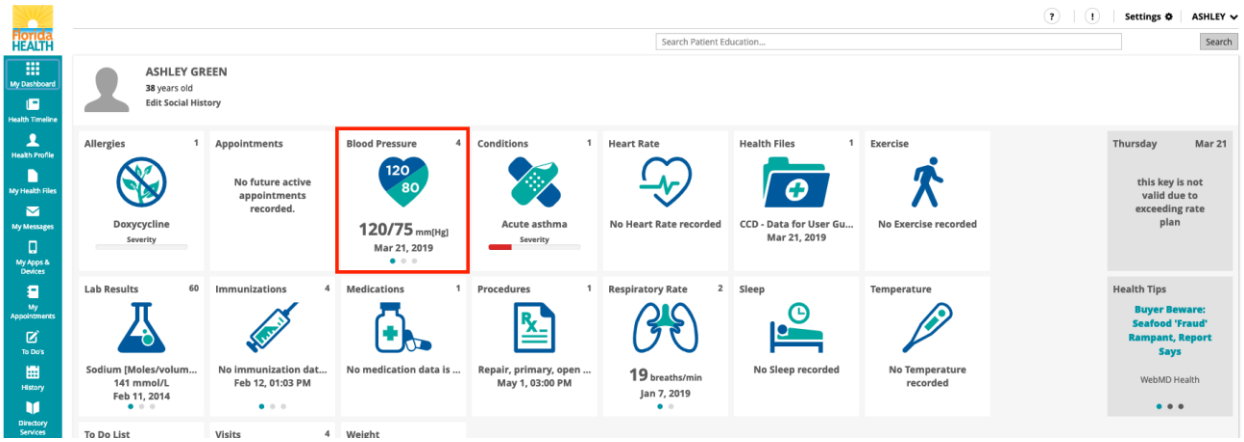
My Dashboard

My Dashboard is the site's homepage. The user lands here upon login and sees a visual summary of their health record. Icons on the **teal** sidebar allow users to navigate between the major functions of the Florida Health Connect platform. Clicking on the main dashboard icons (e.g. Blood Pressure and Heart Rate) provides more information on the health measures or other health record elements.

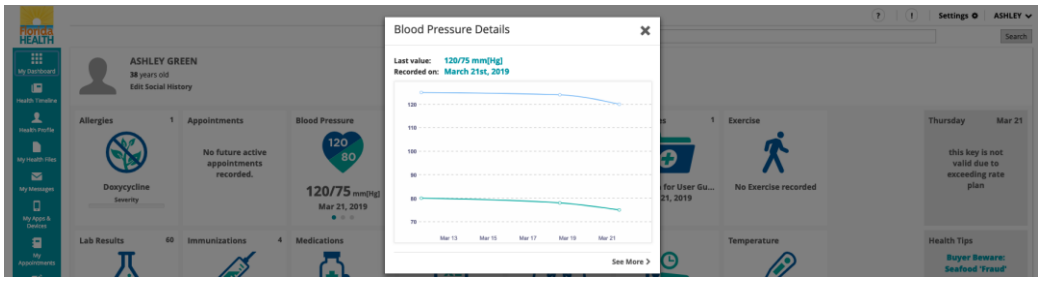
Blood Pressure

Use Case: User wants to monitor their blood pressure.

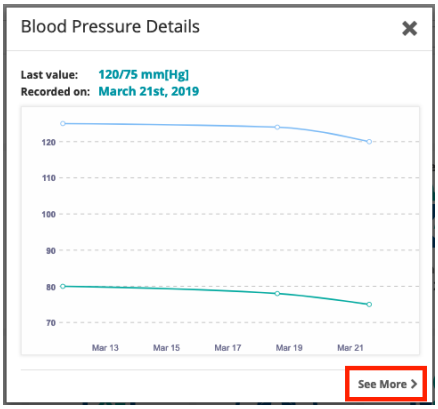
From the *My Dashboard* page, hover mouse cursor over the '***Blood Pressure***' icon. Click the *'<'* or '***>***' buttons to view the three most recent blood pressure measurements.



From the *My Dashboard* page, click the *'**Blood Pressure**'* icon to see a summary graph of the three most recent blood pressure measurements.



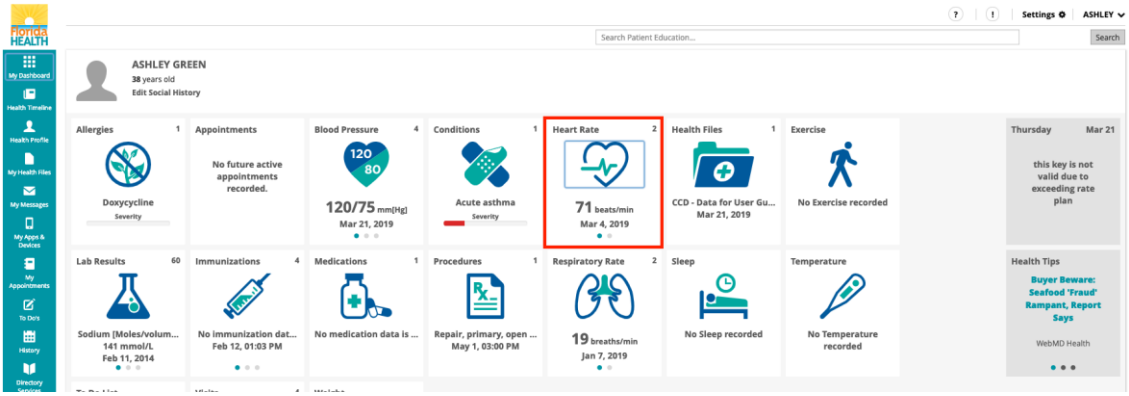
Click '***See More >***' to view the complete list of recorded blood pressure measurements.



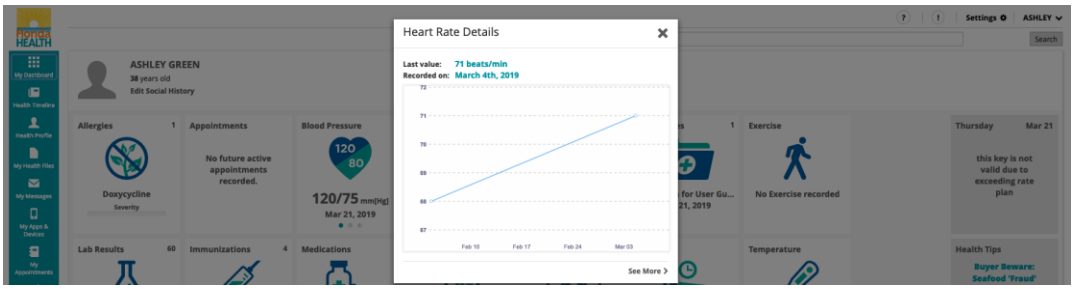
Heart Rate

Use Case: User wants to monitor their heart rate.

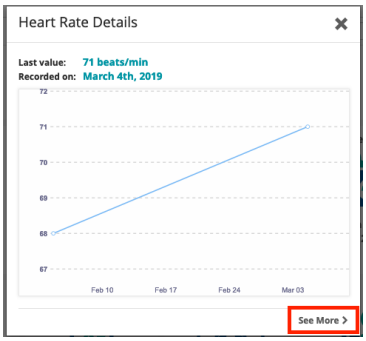
From the My Dashboard page, hover mouse cursor over the '***Heart Rate***' icon. Click the '***<***' or '***>***' buttons to view the three most recent heart rate measurements.



From the *My Dashboard* page, click the *'**Heart Rate**'* icon to see a summary graph of the three most recent heart rate measurements.



Click '***See More >***' to view the complete list of recorded heart rate measurements.



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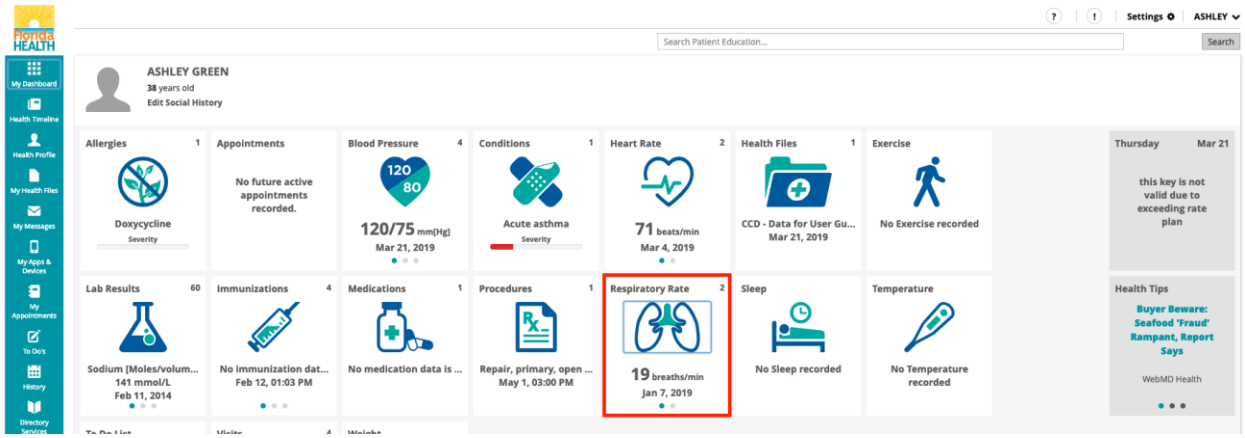
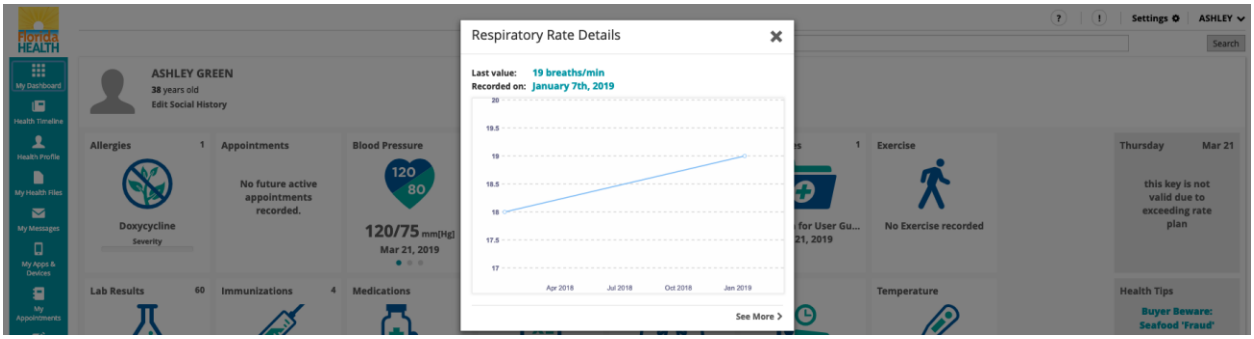
Respiratory Rate

Use Case: User wants to monitor their respiratory rate.

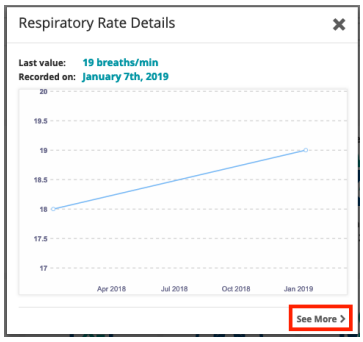
From the *My Dashboard* page, hover mouse cursor over the '***Respiratory Rate***' icon. Click the '**<**' or '**>**' buttons to view the three most recent respiratory rate measurements.



From the *My Dashboard* page, click the '***Respiratory Rate***' icon to see a summary graph of the three most recent respiratory rate measurements.



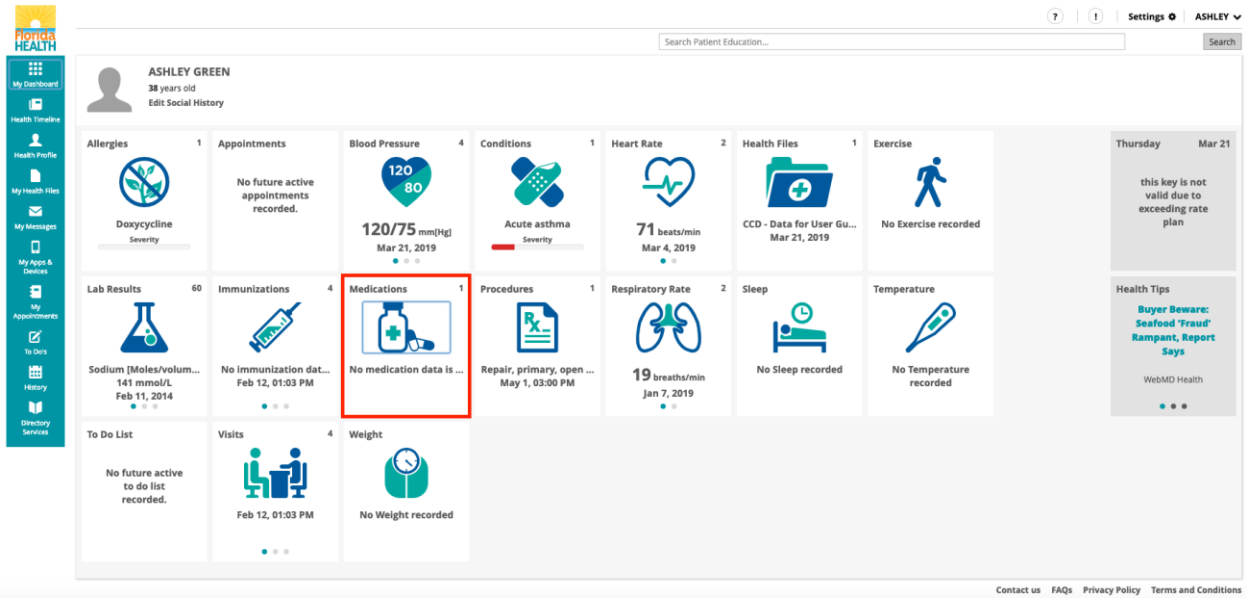
Click '***See More >***' to view the complete list of recorded respiratory rate measurements.



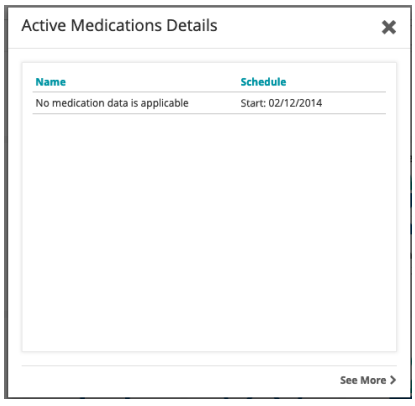
Medications

Use Case: User wants to track their medications from all of their healthcare providers.

From the *My Dashboard* page, hover mouse cursor over the '***Medications***' icon. Click the '**<**' or '**>**' buttons to view the three most recent medication records.



From the *My Dashboard* page, click on the '***Medications***' icon to see a summary bar graph of the duration of the three most recent medications. Hovering the mouse cursor over any of the three bars it will display the information about the medication, such as name, dosage, and mode of delivery (e.g. by mouth, injection, or topical).

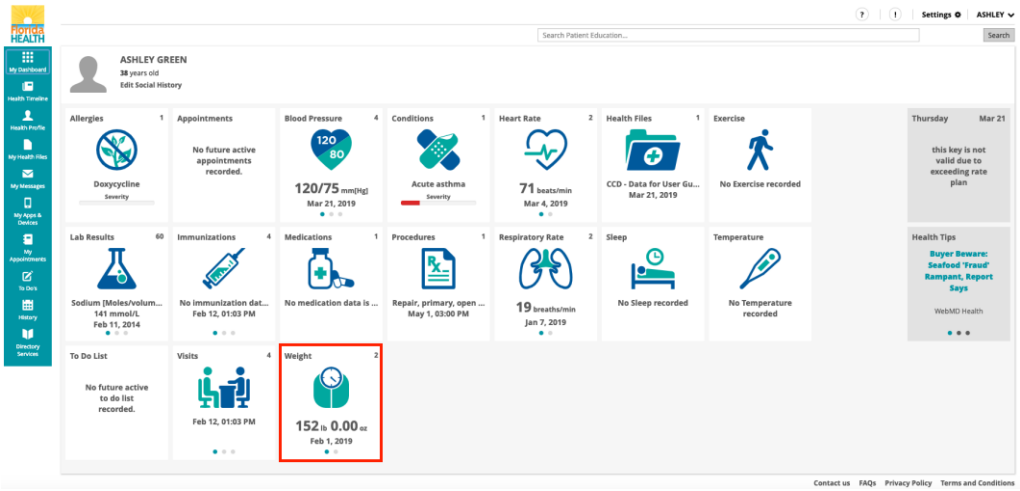


Click '***See More >***' to view a complete list of all previous medication records. Each record shows the name, schedule (frequency, dosage, start date), and status of the medication.

Weight

Use Case: User wants to track their weight over time.

From the *My Dashboard* page, hover mouse cursor over the '***Weight***' icon. Click the '***<***' or '***>***' buttons to view the three most recent weight measurements.



From the *My Dashboard* page, click the '***Weight***' icon to see a summary graph of the three most recent measurements.

Click '***See More >***' to view the complete list of recorded weight measurements. Each record shows the weight, height, BMI, and date of entry.

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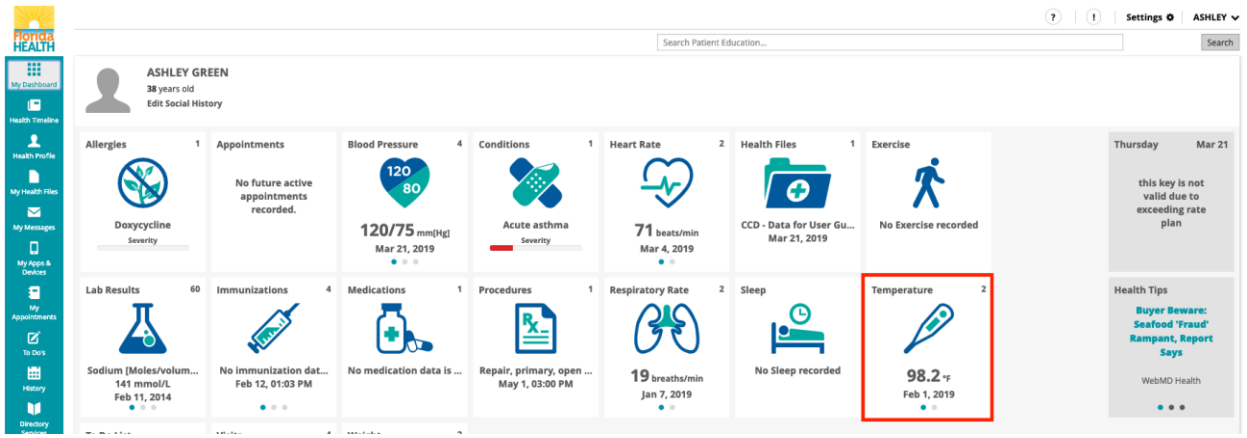
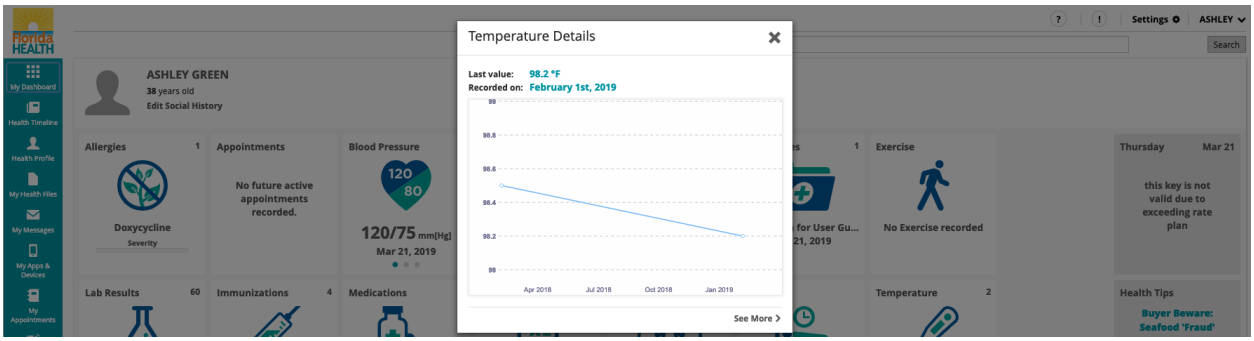
Temperature

Use Case: User wants to track their temperature over time.

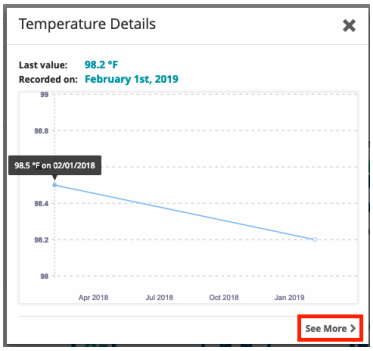
From the *My Dashboard* page, hover mouse cursor over the '***Temperature***' icon. Click the '**<**' or '**>**' buttons to view the three most recent temperature measurements.



From the *My Dashboard* page, click the '***Temperature***' icon to see a summary graph of the three most recent temperature measurements.



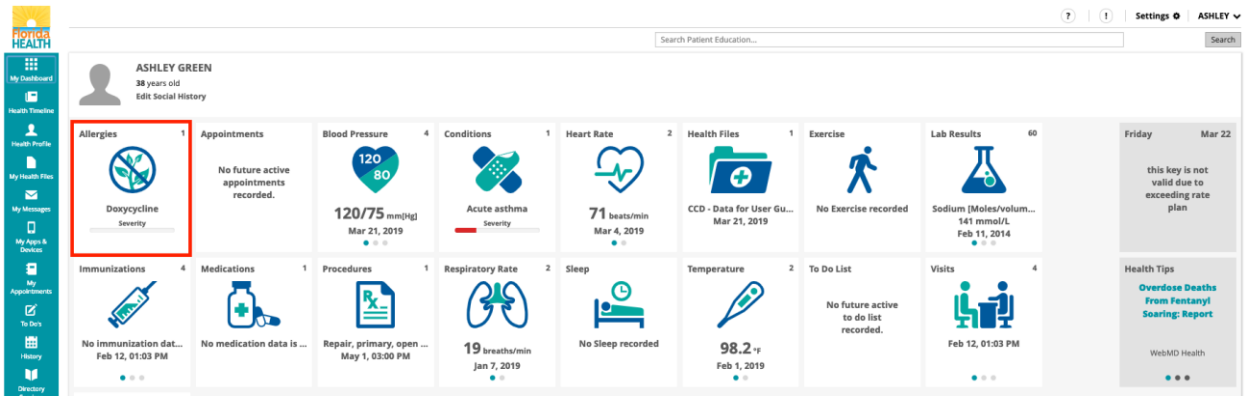
Click '***See More >***' to view the complete list of recorded temperature measurements.



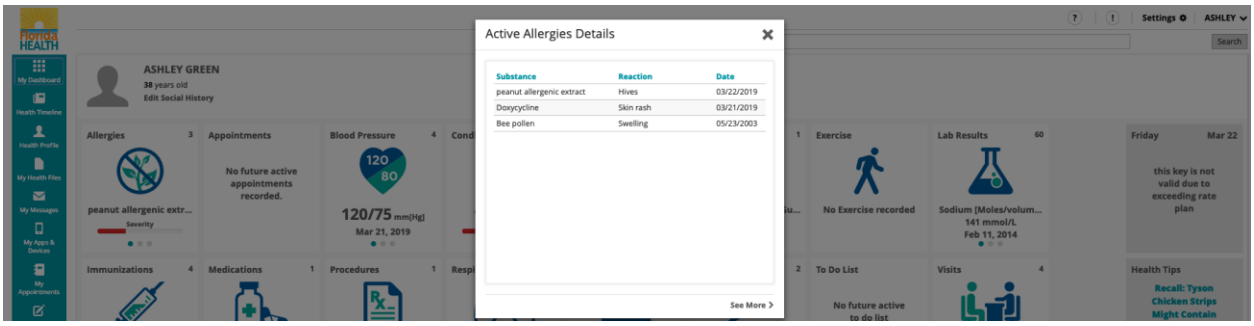
Allergies

Use Case: User wants to track their known drug allergies

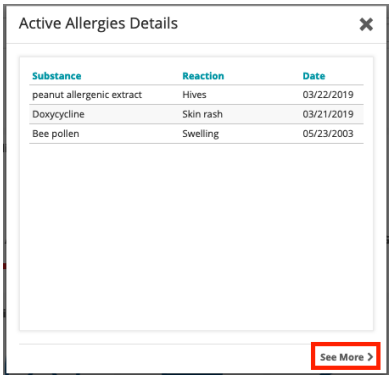
From the *My Dashboard* page, hover mouse cursor over the '***Allergies***' icon. Click the '**<**' or '**>**' buttons to view the three most recent allergy records.



From the *My Dashboard* page, click the '***Allergies***' icon to see a summary table of the three most recent allergy records.



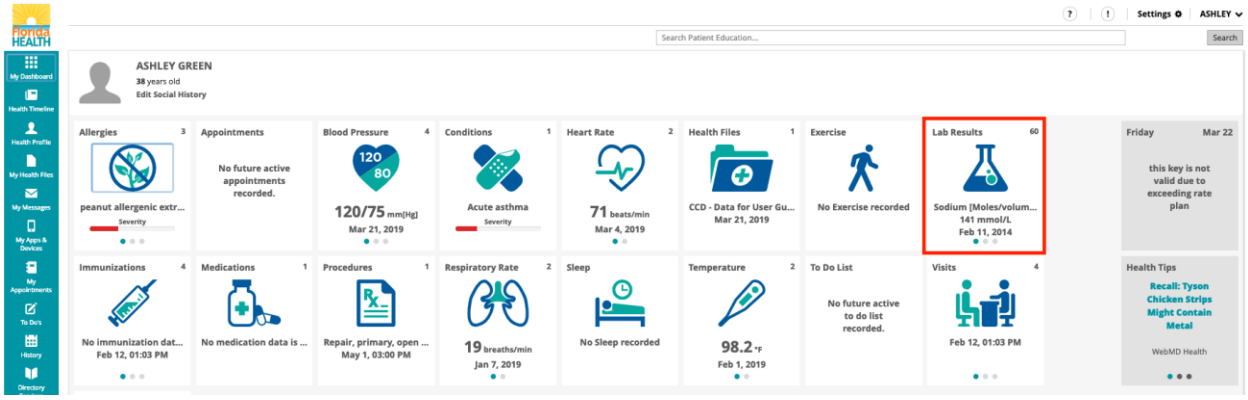
Click '***See More >***' to view a complete list of all recorded allergies, with substance, reaction, status, and date recorded.



Lab Results

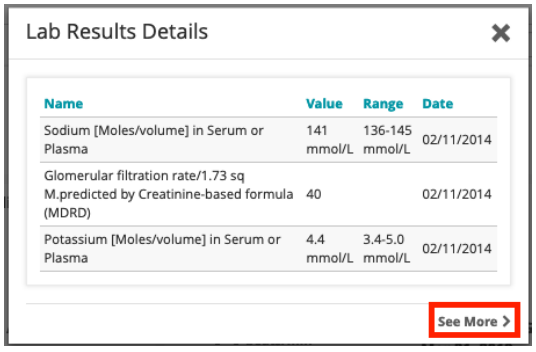
Use Case: User wants to view their lab results.

From the *My Dashboard* page, hover mouse cursor over the '***Lab Results***' icon. Click the '**<**' or '**>**' buttons to view the three most recent lab results.



From the *My Dashboard* page, click the '***Lab Results***' icon to see a summary table of the three most recent lab results.

Click '***See More >***' to view a complete list of all recorded lab results. Each record shows the name of the test, value, range, date, and section.



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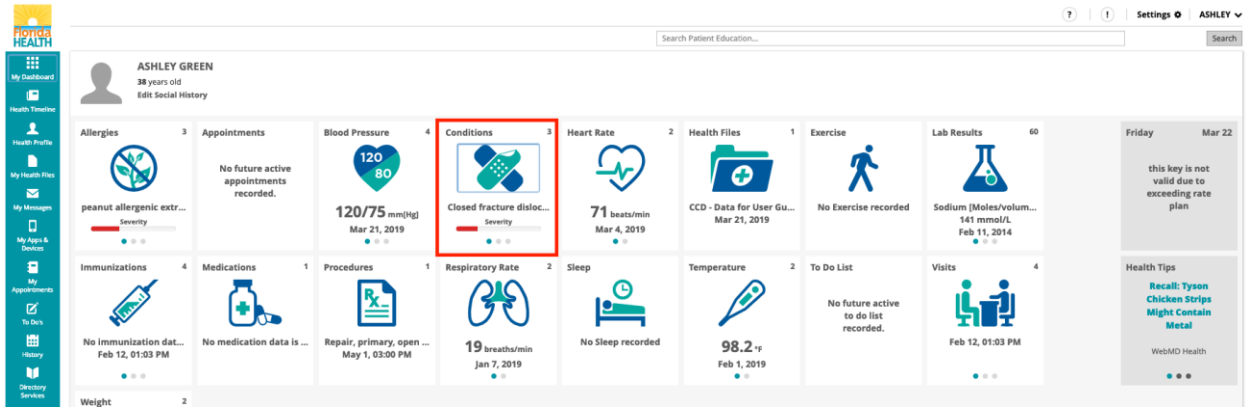
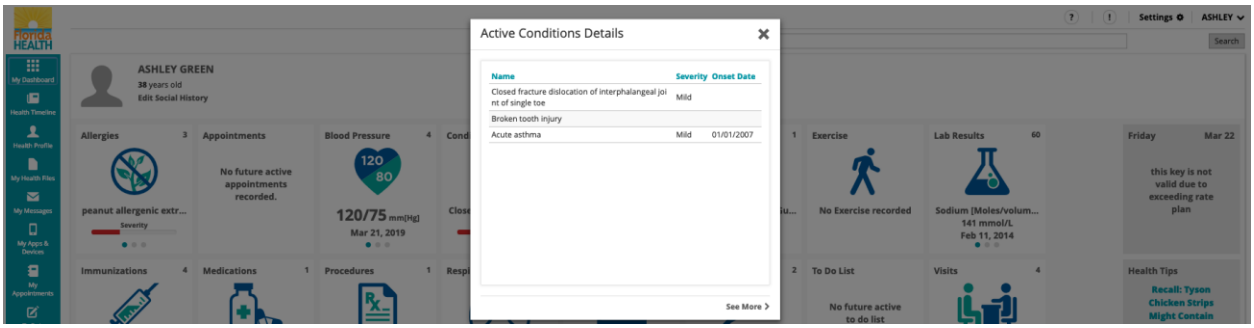
Conditions

Use Case: User wants to track their current and past medical conditions.

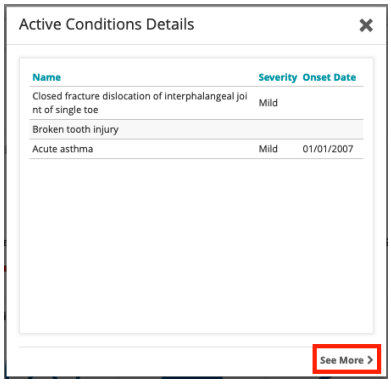
From the *My Dashboard* page, hover mouse cursor over the '***Conditions***' icon. Click the '***<***' or '***>***' buttons to view the three most recently diagnosed conditions.



From the *My Dashboard* page, click the '***Conditions***' icon to see a summary table of the three most recently diagnosed conditions.



Click '***See More >***' to view a complete list of current and past medical conditions. Each record lists the name of the diagnosis, severity, status and onset date.



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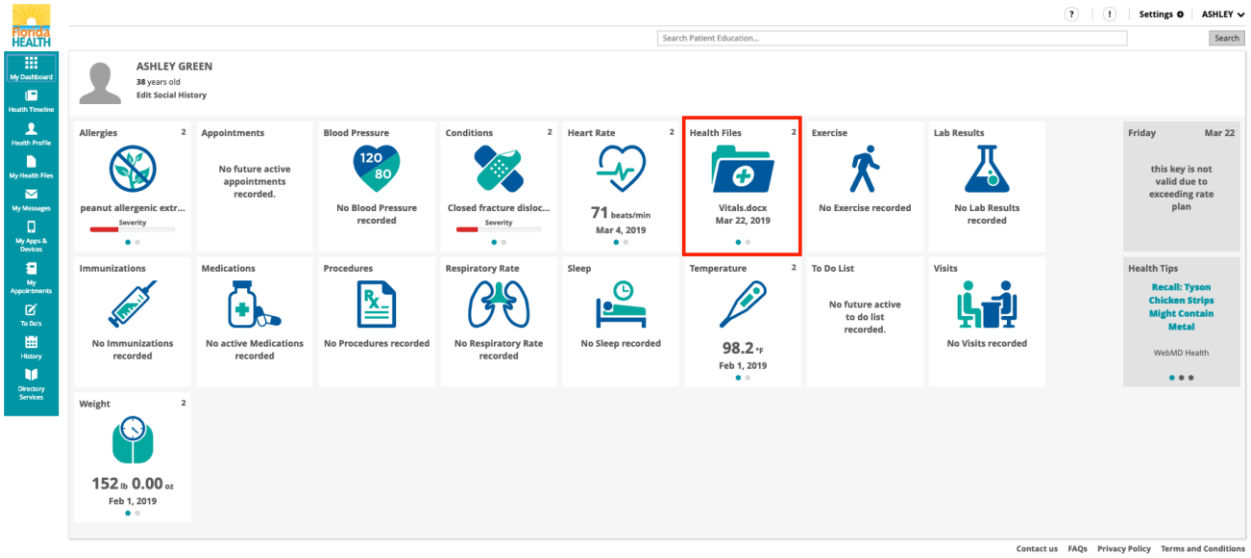
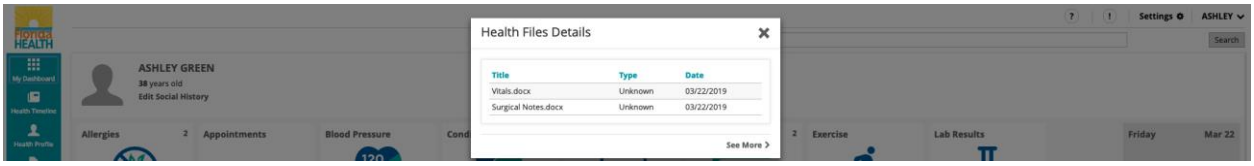
Health Files

Use Case: User wants to have access to their health files (e.g. provider notes or radiology reports).

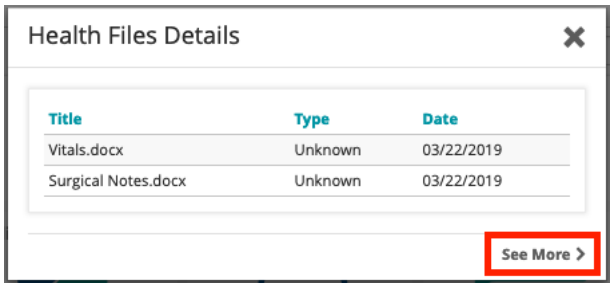
From the *My Dashboard* page, hover mouse cursor over the '***Health Files***' icon. Click the '***<***' or '***>***' buttons to view the three most recent health files.



From the *My Dashboard* page, click the ***'Health Files'*** icon to see a summary table of the three most recent health files.



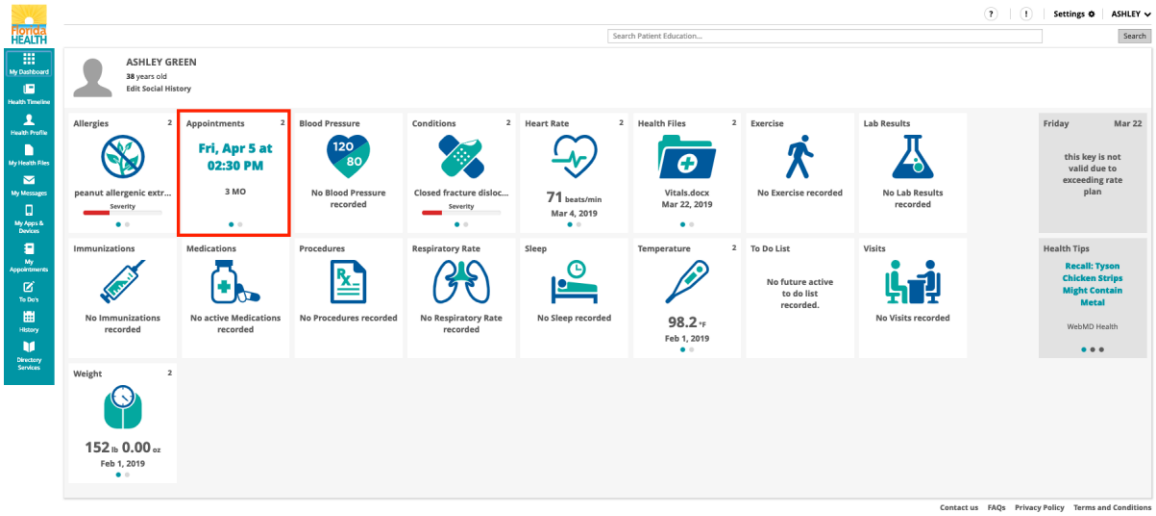
Click '***See More >***' to view a complete list of all recorded health files.



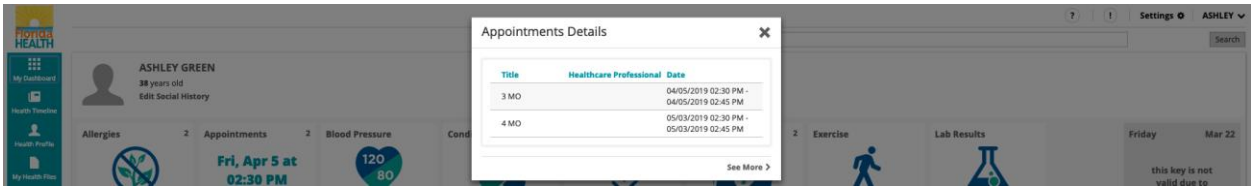
Appointments

Use Case: User wants to create and maintain a calendar for medication refills and appointment reminders.

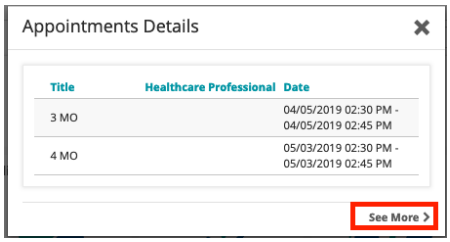
From the *My Dashboard* page, hover mouse cursor over the '***Appointments***' icon. Click the '***<***' or '***>***' buttons to view up to three future appointments.



From the *My Dashboard* page, click the '***Appointment***' icon to see a summary table of up to three future appointments. Each appointment record includes title (e.g. annual check-up), healthcare professional (e.g. Dr. Adam West), and date.



Click '***See More >***' to view a complete list of all the prior and upcoming appointments.



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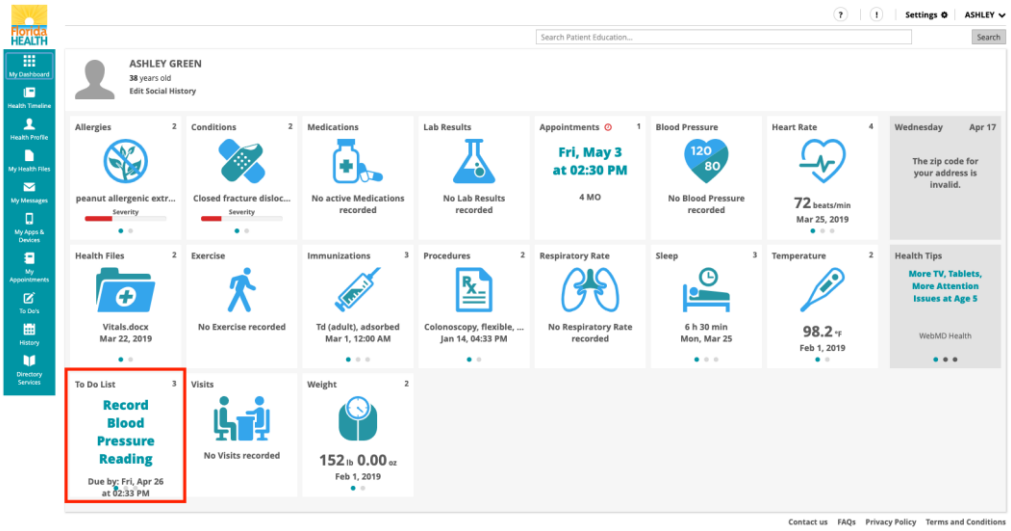
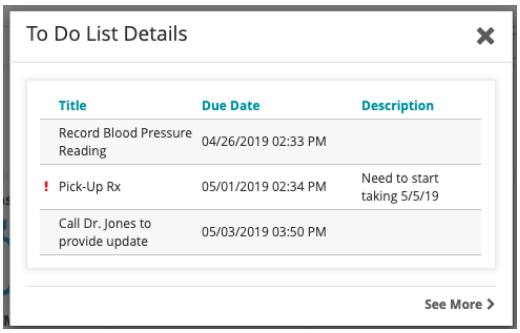
To Do List

Use Case: User wants to create a to-do list with reminders for upcoming events.

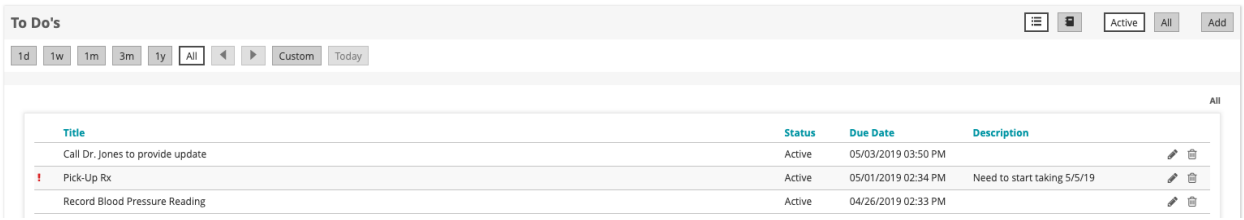
From the *My Dashboard* page, hover mouse cursor over the '***To Do List***' icon. Click the '***<***' or '***>***' buttons to view up to three items on the to-do list.



From the *My Dashboard* page, click the '***To Do List***' icon to see up to three upcoming to-do reminders.



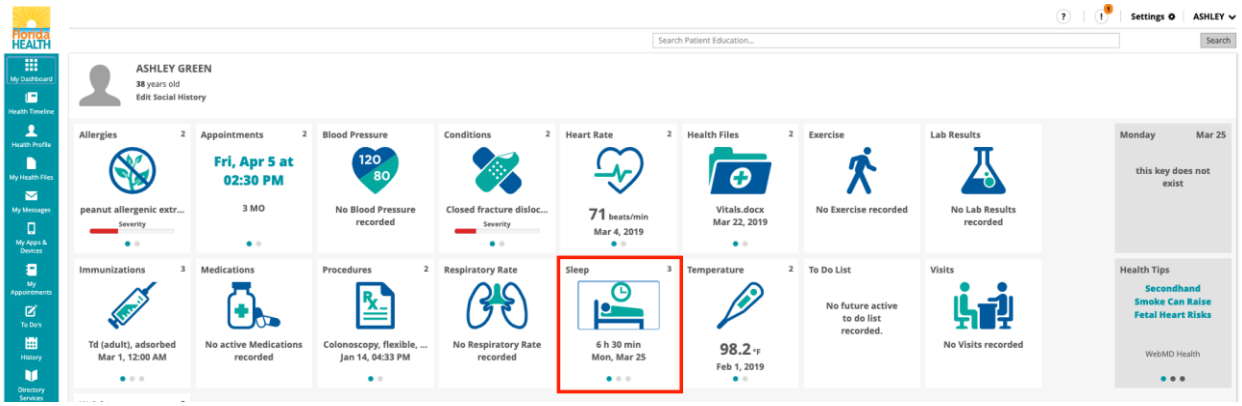
Click '***See More >***' to view a complete list of all previous and upcoming items on the to-do list. Each entry shows the title, due date, and description of the task.



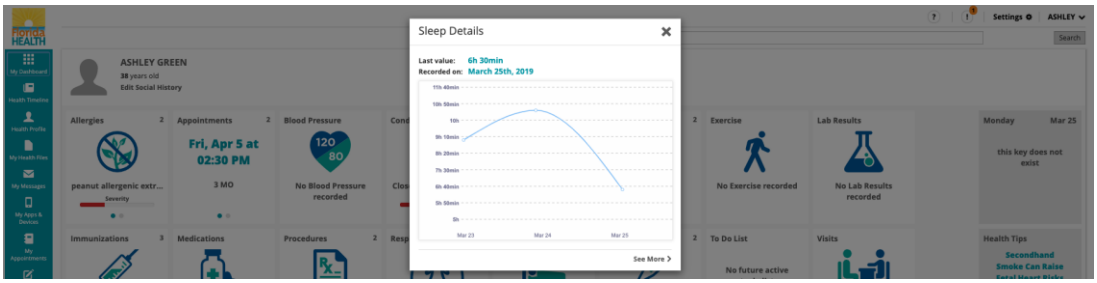
Sleep

Use Case: User wants to track health data (e.g. from wearables) regarding their sleep patterns and share the data with their healthcare providers.

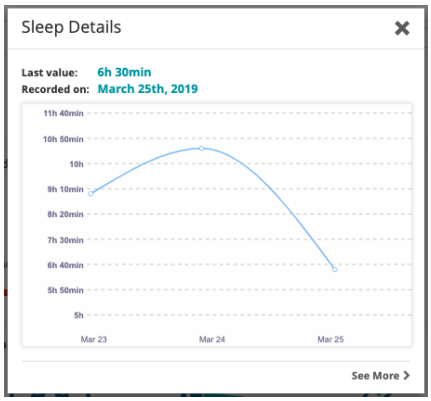
From the *My Dashboard* page, click on '***<***' or '***>***' *(must have cursor on icon for the arrows to appear)* on the '***Sleep***' icon to see the three most recent sleep records.



From the *My Dashboard* page, click the '***Sleep***' icon to see a summary graph of the three most recent sleep records.



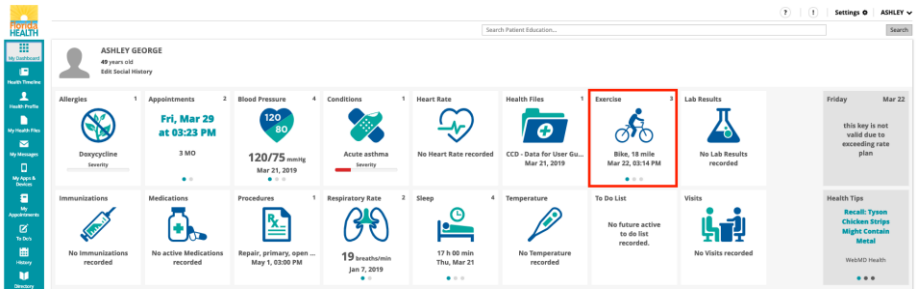
Click on '***See More>'*** to to view a complete list of all recorded sleep details. Each record shows the date and duration of the recorded sleep.



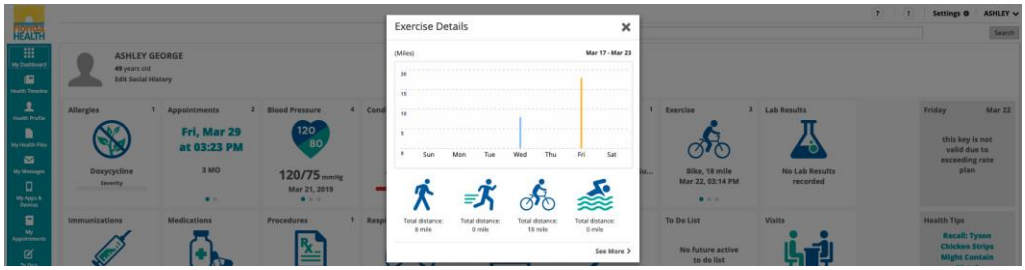
Exercise

Use Case: User wants to upload and track wearable exercise data and share with their healthcare providers.

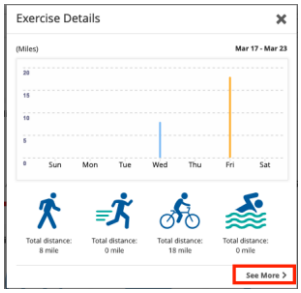
From the *My Dashboard* page, click on '***<***' or '***>***' *(must have cursor on icon for the arrows to appear)* on the '***Exercise***' icon to see the three most recent exercise records with icons reflecting type of exercise (walking, running, biking, or swimming).



From the *My Dashboard* page, click on the '***Exercise***' icon to see a summary graph of the three most recent exercise records. Each bar is color coded to indicate type of exercise (walking, running, biking, or swimming) with the weekly total for each type listed below the respective icons.



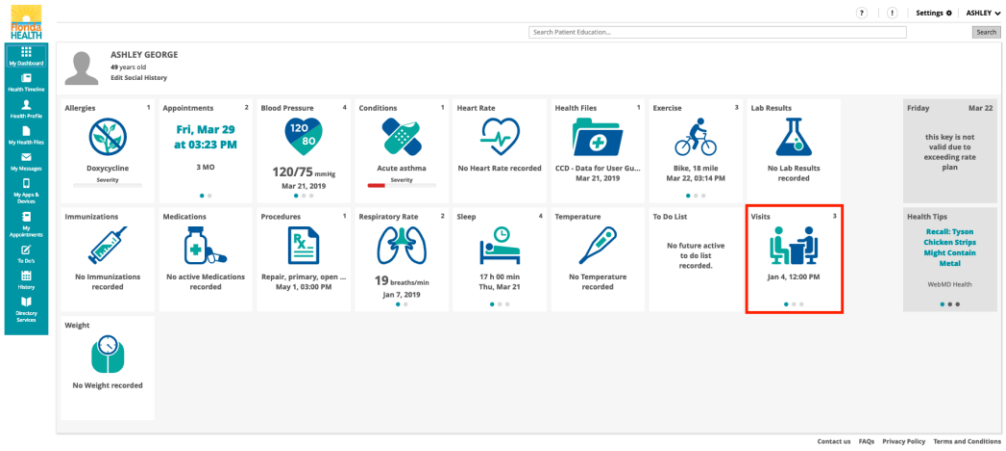
Click on '***See More>***' to view a complete list of all recorded exercise. Each record shows the icon of the type of exercise (walking, running, biking or swimming) along with the date, duration, steps (where applicable), and distance.



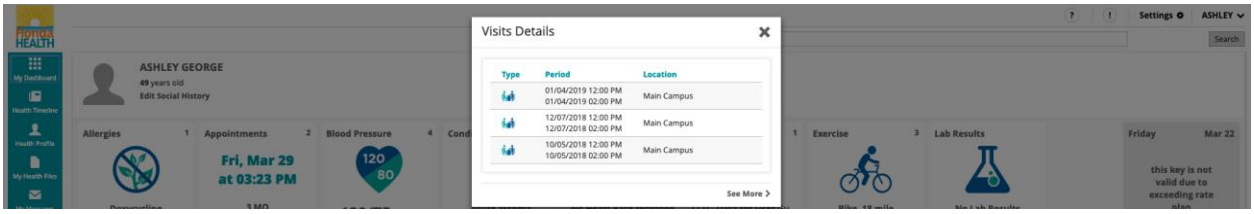
Visits

Use Case: User wants to track visits with their healthcare providers.

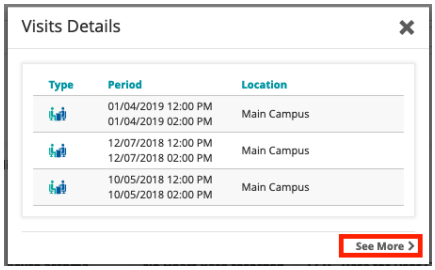
From the *My Dashboard* page, click on ***'<'*** or ***'>'*** *(must have cursor on icon for the arrows to appear)* on the ***'Visits'*** icon to see the three most recent visits records with icons reflecting type of visits (Inpatient, Ambulatory, or Emergency).



From the *My Dashboard* page, click the '***Visits***' icon to see a summary table of the three most recent visit records. The icon to the left of each entry indicates type of visit (inpatient, ambulatory, or emergency).



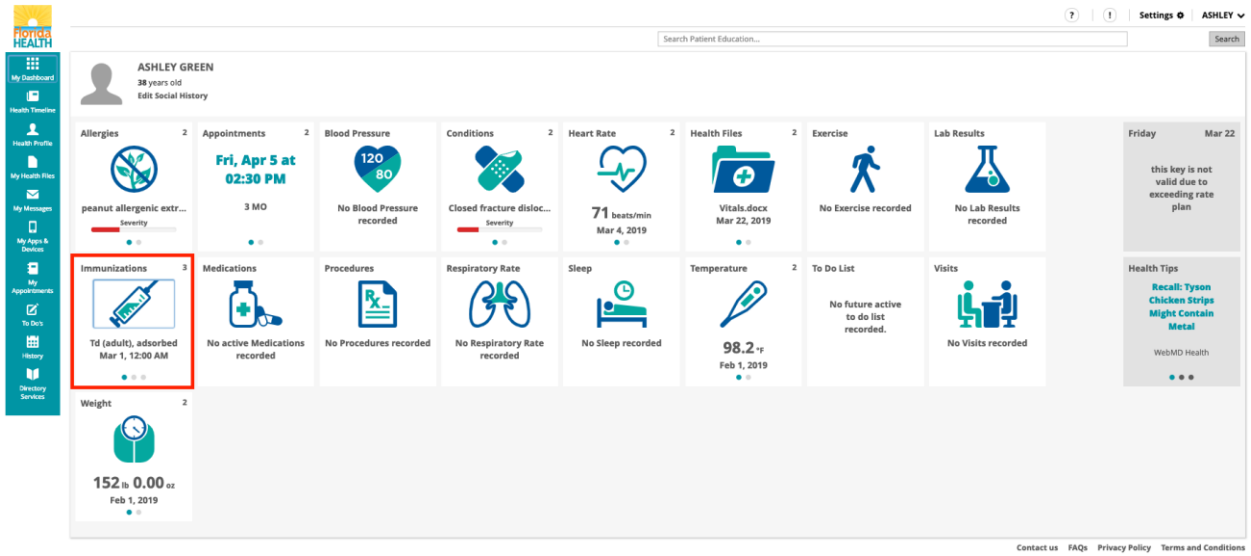
Click on '***See More>'*** to view a complete list of all recorded visits. Each record shows the type of visit (Inpatient, Ambulatory, or Emergency) along with the date period and location. It also shows Reason and Attending.



Immunizations

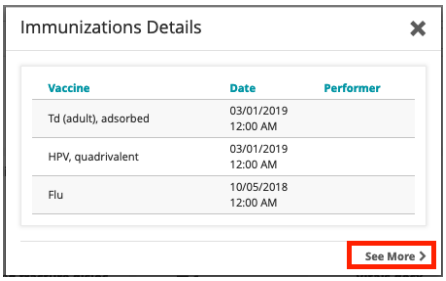
Use Case: User wants to keep track of their immunizations from their healthcare providers.

From the *My Dashboard* page, click on '**<**' or '**>**' *(must have cursor on icon for the arrows to appear)* on the '***Immunizations***' icon to see the three most recent immunization records.



From the *My Dashboard* page, click on the '***Immunizations***' icon to see a summary table of the three most recent immunization records.

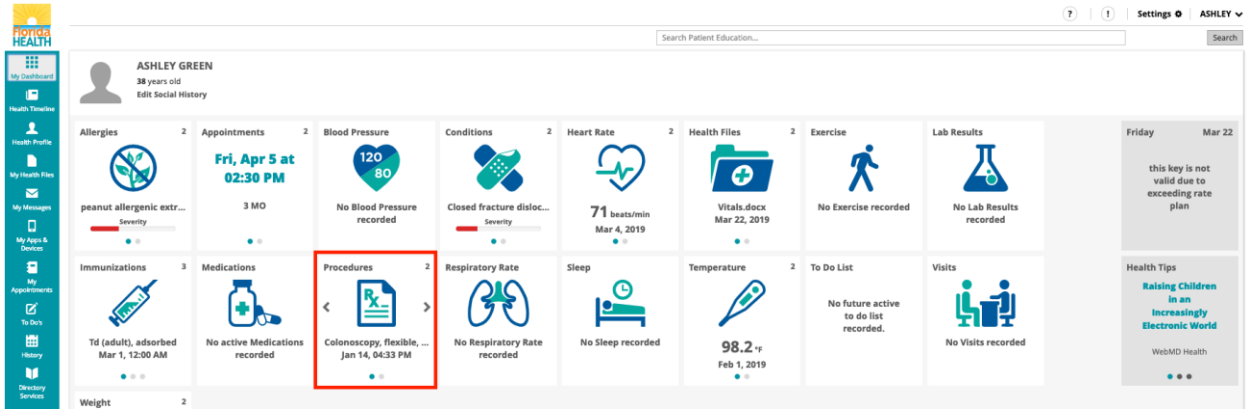
Click on '***See More>'*** to view a complete list of all recorded immunizations. Each record shows the type of vaccine, date, performer, body site and administration notes.



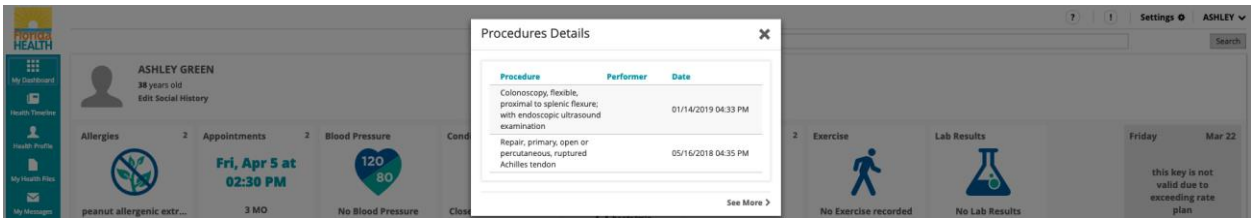
Procedures

Use Case: User wants to keep track of their past medical or surgical procedures.

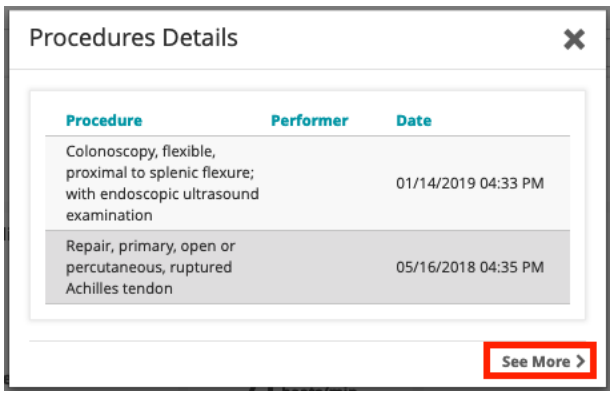
From the *My Dashboard* page, click on '**<**' or '**>**' *(must have cursor on icon for the arrows to appear)* on the '***Procedures***' icon to see the three most recent procedure records.



From the *My Dashboard* page, click on the '***Procedures***' icon to see a summary table of the three most recent procedure records.



Click on '***See More>***' to view a complete list of all recorded procedures. Each record shows the type of procedure, performer, date and body site.



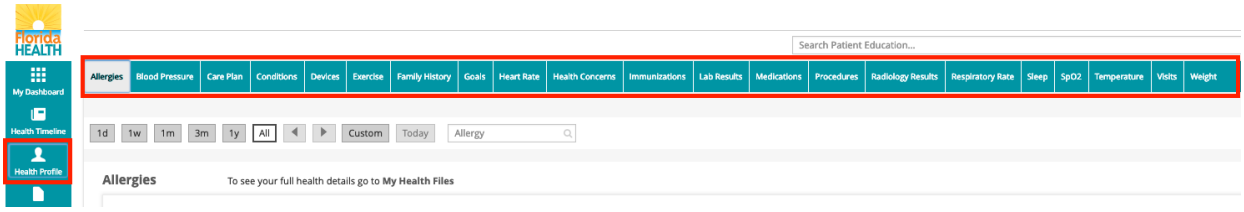
Health Profile

View/Edit Medical Record

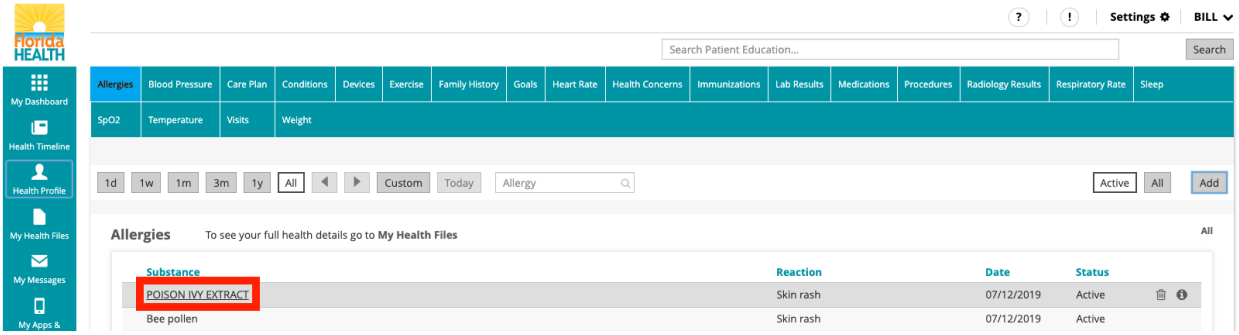
Use Case: User would like to view and edit their complete medical record.

Click on the '***Health Profiles***' button on the **teal** sidebar to access the medical record.

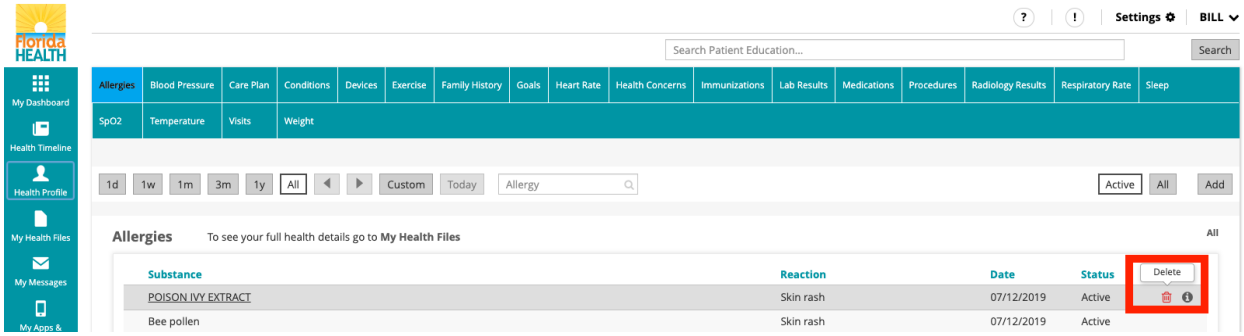
To view and edit the different sections of the record (e.g. Blood Pressure, Heart Rate, etc.), click on the **teal** tabs at the top of the page.



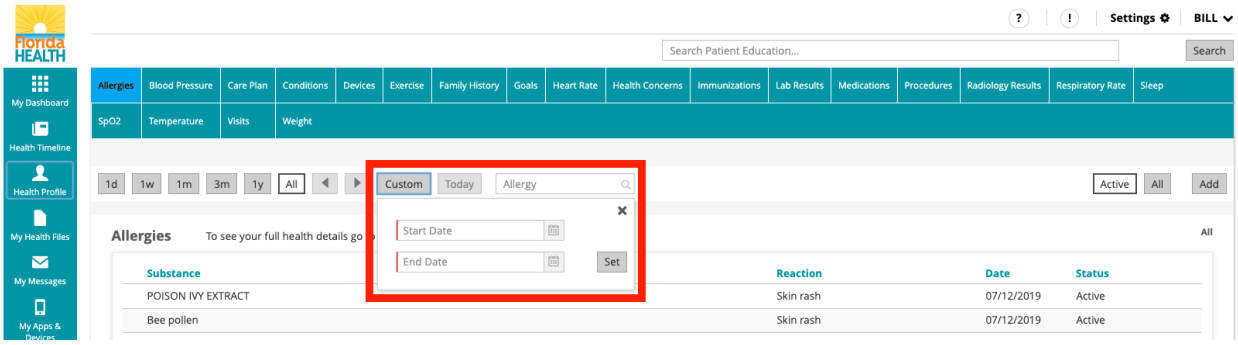
To edit a record, click on the record.



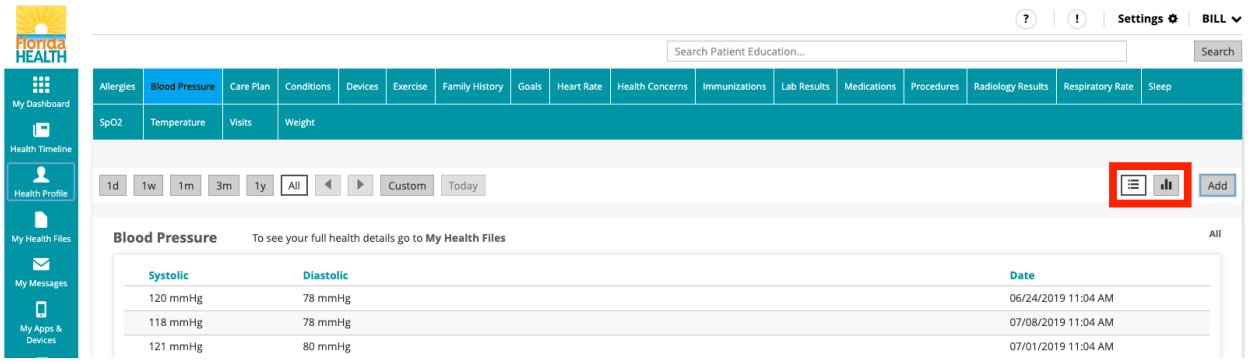
To delete a record, click on the trashcan icon to the far right of that record.



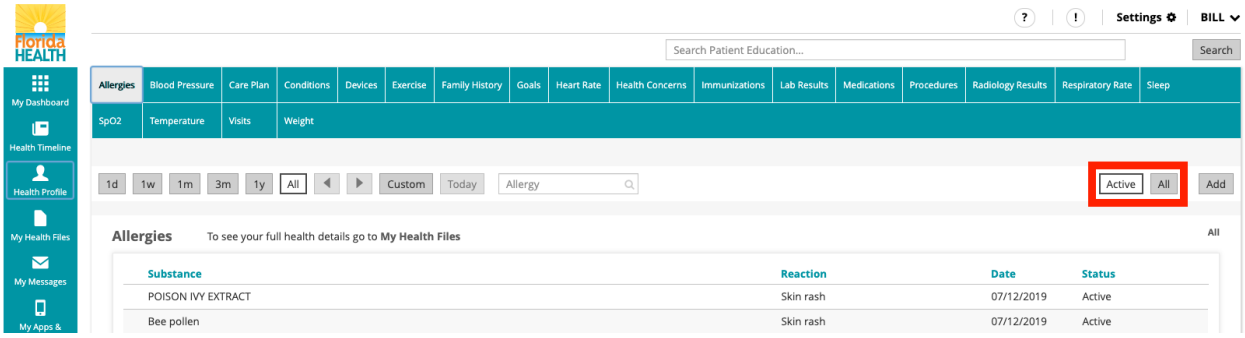
To change the date range for records in each category, select one of the preset buttons or click '***Custom***' to insert your own range of dates.



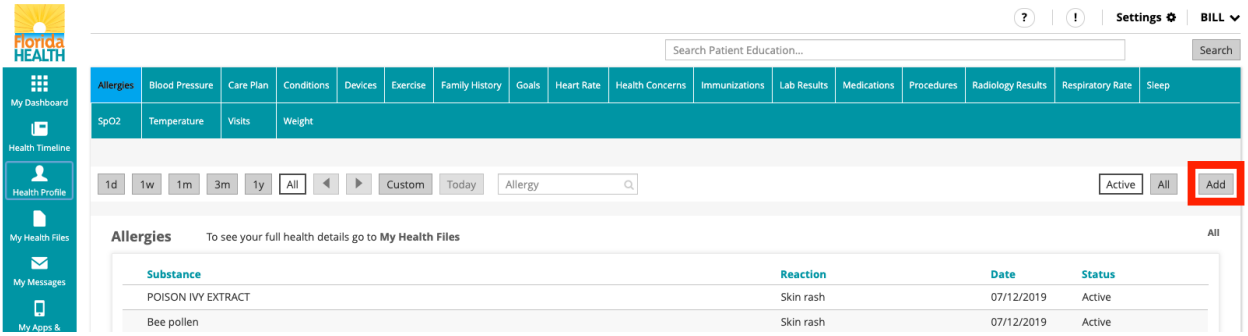
To toggle the view of the complete record between a list and a graph (available for all categories except Allergies and Conditions, Procedures, Care Plan, Devices, Family History, Goals, Health Concerns, Immunizations, Radiology Results, SpO2, and visits to the list) click on the list and bar graph icons to the far right of the date range buttons.



To toggle the view of the complete record between active (for Allergies, Conditions, Medications, and Health Concerns) and all records, click on the '***Active***' or '***All***' buttons on the menu to the far right of the date range buttons.



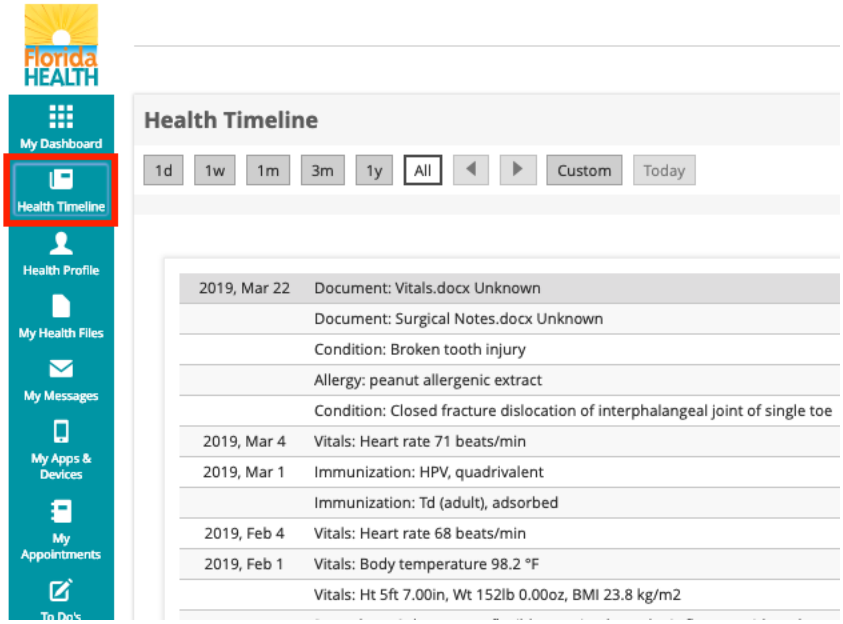
To add a new record to the Health Profile, click the '***Add***' button on the top right of the page.



Health Timeline

The *Health Timeline* shows when health data has been received into your account. These events are displayed in order of receipt; most recent first.

From any page in Florida Health Connect, navigate to the *Health Timeline* page by clicking the *Health Timeline* icon on the **teal** sidebar.



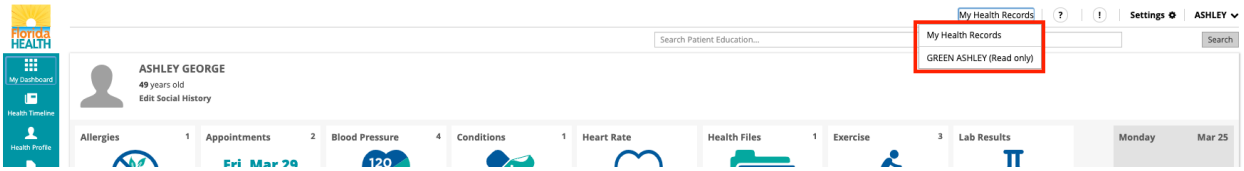
MedicaSoft

My Health Records

View Health Profile(s)

Use Case: User wants to be able to view their own profile or the profile of another user who has given them access.

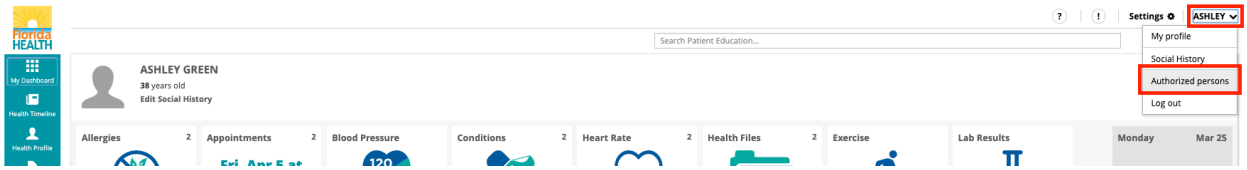
Click on '***My Health Records***' at the top of the screen. When the dropdown menu appears click either '***My Health Records***' (default) or the name of the user who has authorized access to their health record.



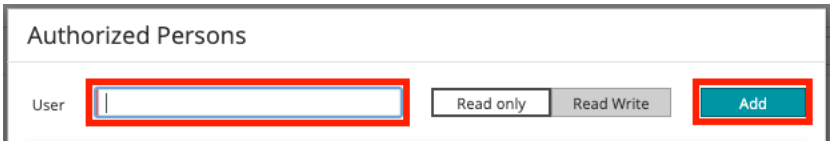
Authorize Access to Health Records

Use Case: User wants to authorize another user to access their health records with different permission settings (e.g. read-only or read-write).

Click user's name in the upper right of the screen. In the dropdown menu, click on '***Authorized persons***.'



From there, enter in the name of the user who will be given permission to access this health record. Note that the other user must have an existing Florida Health Connect account. Select permission setting (read-only, read-write) and click '**Add**.' The new user will then be authorized.

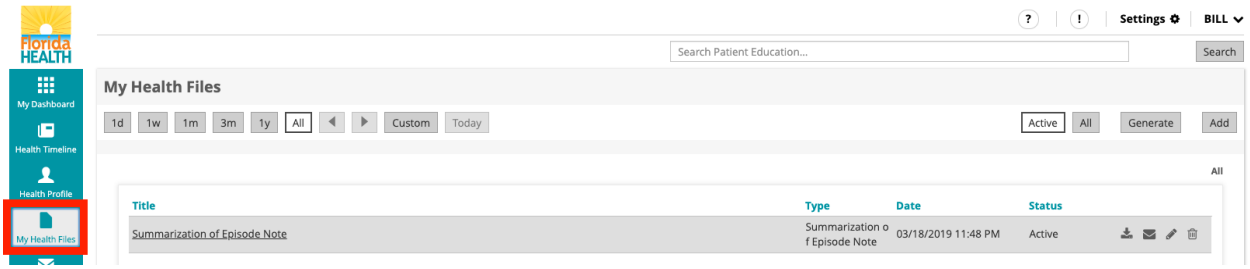


MedicaSoft

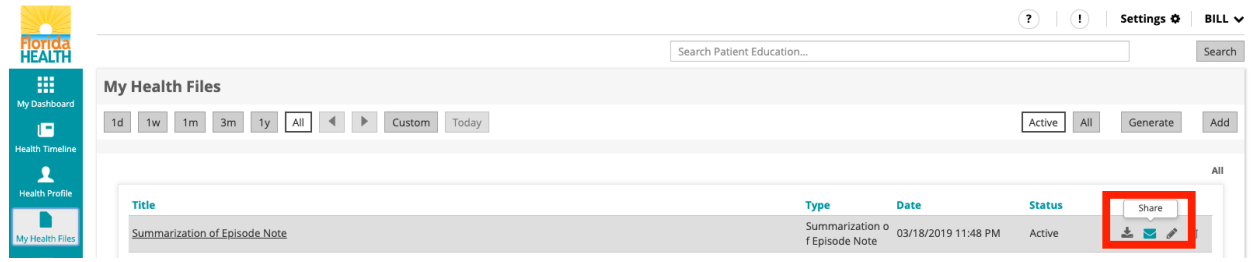
Share Medical Record

Use Case: User wants to share medical records with their healthcare provider.

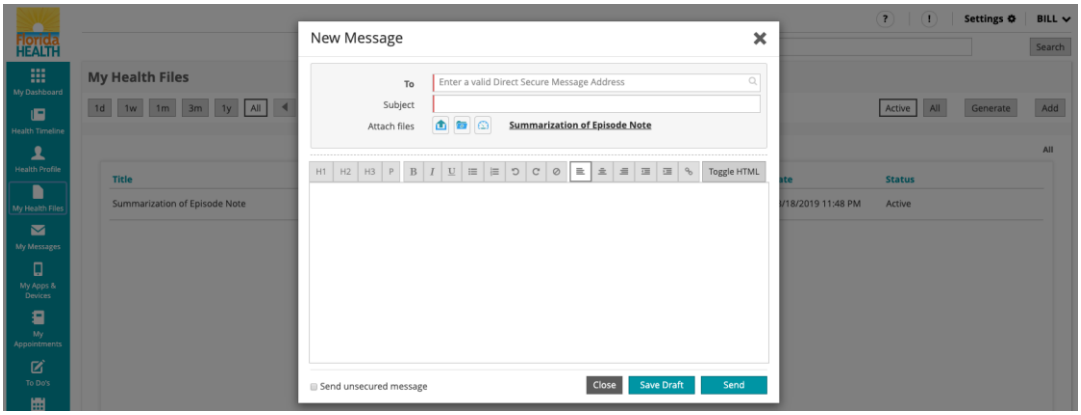
On the **teal** sidebar, select *'**My Health Files**'* to view a list of all files that have been sent to, or uploaded into, Florida Health Connect.



Select the file to be shared, then click the envelope icon on the right. An email prompt will appear.



In the To field, type in the healthcare provider's name. If the provider is not already a saved contact, either type the provider's full email address or proceed to add the provider as a contact as demonstrated in the *Add/Edit Contacts* section. Then, enter a subject for the message in the Subject field.



Compose a message and click '***Send***.'

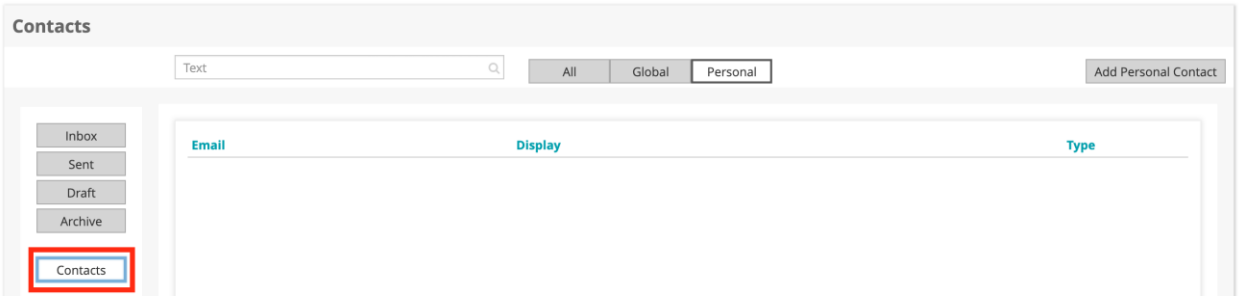
My Messages

Add/Edit Contacts

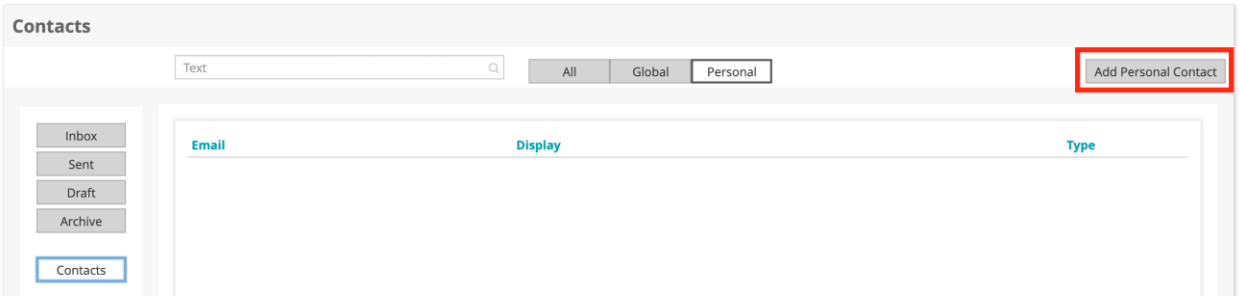
Use Case: User would like add or edit a contact in their Florida Health Connect address book.

From the *My Dashboard* homepage, navigate to the *My Messages* section by clicking on the '***My Messages***' envelope icon in the **teal** sidebar.

Click on the gray '***Contacts***' button at the bottom of the left menu.



To add a new contact, click the '***Add Personal Contact***' button on the top right corner.

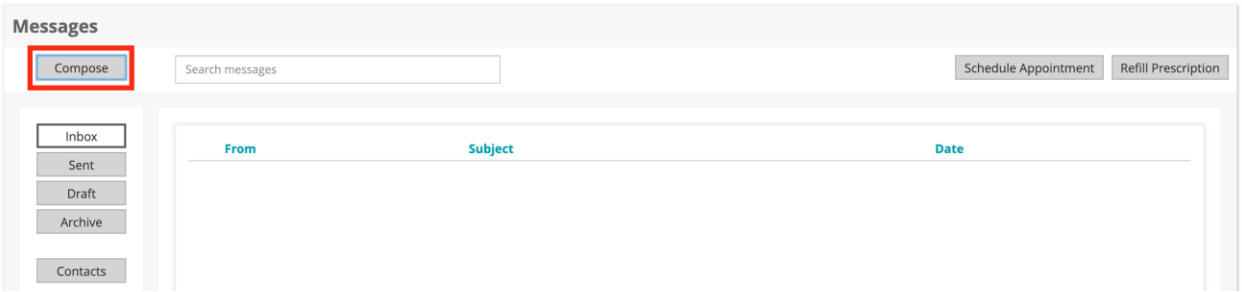


Enter the direct address of the recipient and a display name and click '***Save***.'

Send Secure Message

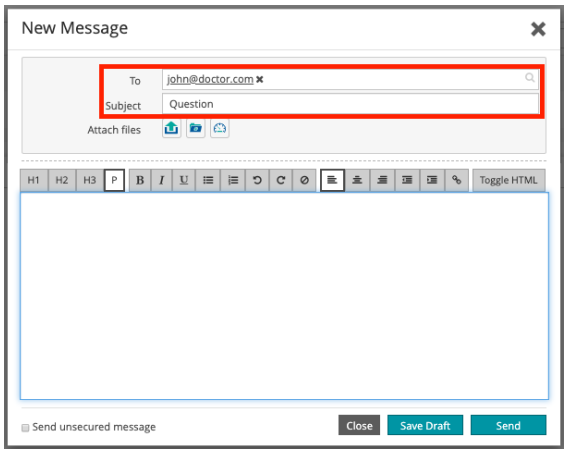
Use Case: User would like to send a secure email to their healthcare provider, family member, proxy, or other individual, organization, or institution that requests a medical record with direct address.

On the *Messages* page, click on the gray '***Inbox***' button in the left menu. To begin writing a message, click the '***Compose***' button.

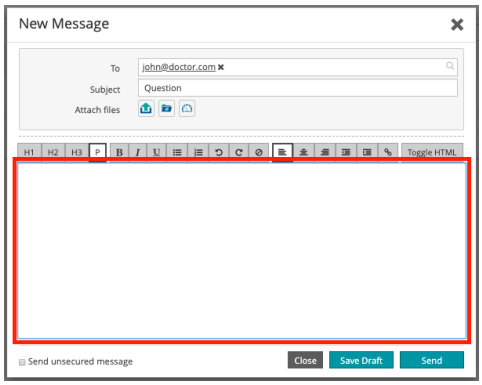


In the To field, type in the recipient's name. If the recipient is not already a saved contact, either type the provider's full email address or proceed to add the provider as a contact as demonstrated in the *Add/Edit Contacts* section. If the recipient is a saved contact, the field will auto-populate.

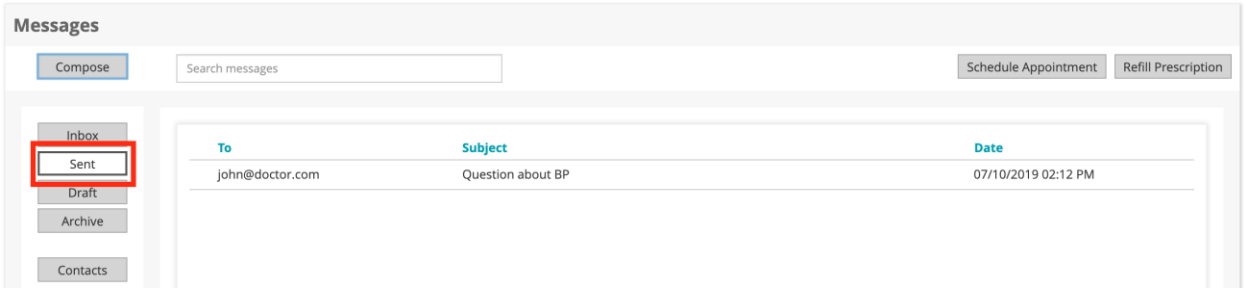
Then, enter a subject for the message in the Subject field.



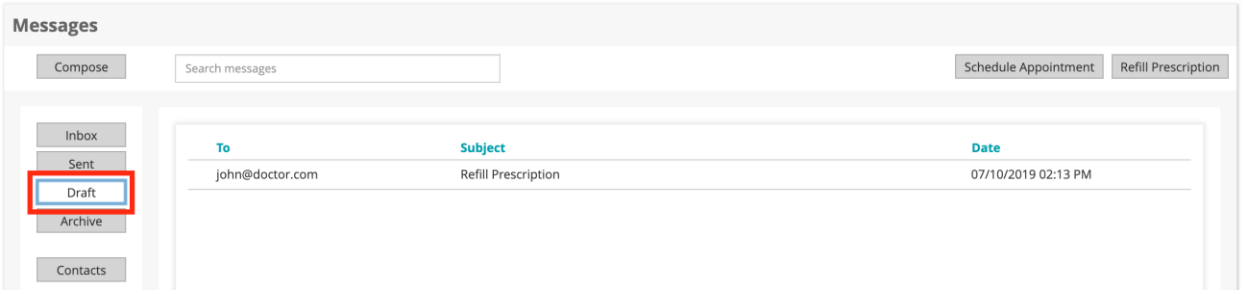
Compose a message to the recipient and click '***Send***.'



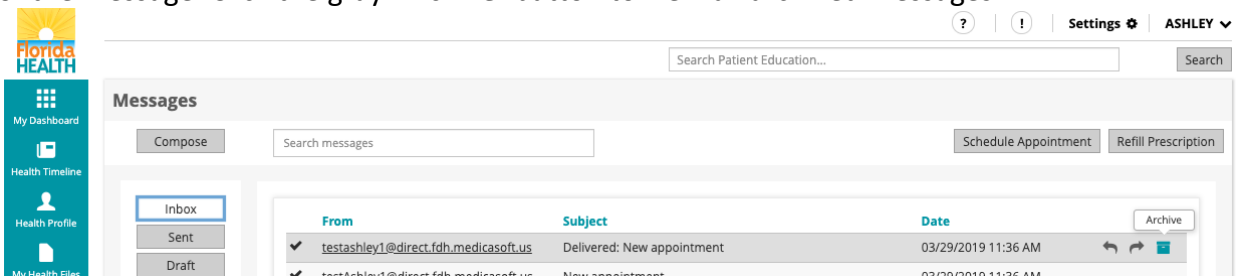
To view sent messages, navigate to the gray '***Sent***' button in the left menu.



To view messages that have been composed but not yet sent, click the gray '***Draft***' button in the left menu.



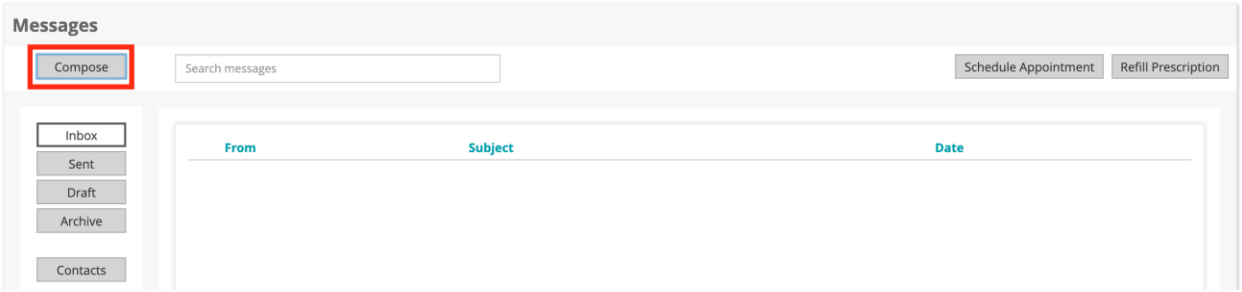
To archive any message in the *Inbox* or *Sent* folder, click on the file cabinet icon to the far right of the message. Click the gray '***Archive***' button to view all archived messages.



Communicate About Lab Results

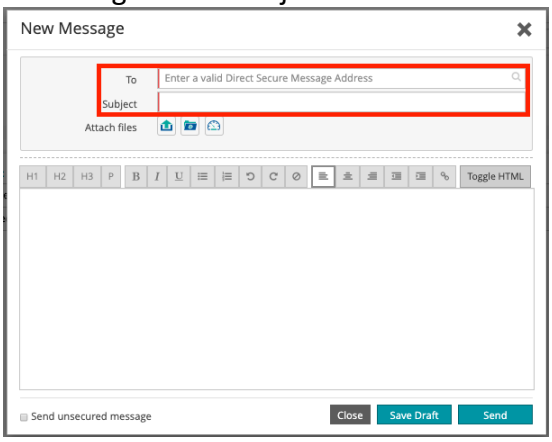
Use Case: User wants to communicate with their healthcare provider about their lab results.

Click the '***My Messages***' button from the **teal** sidebar. Then, click the gray '***Compose***' button.

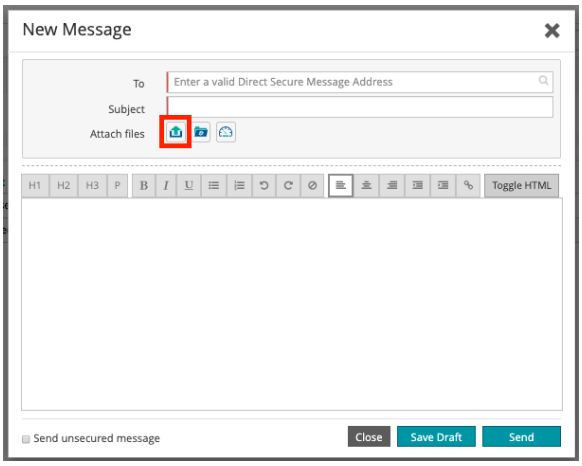


In the To field, type in the recipient's name. If the recipient is not already a saved contact, either type the provider's full email address or proceed to add the provider as a contact as demonstrated in the *Add/Edit Contacts* section. If the recipient is a saved contact, the field will auto-populate.

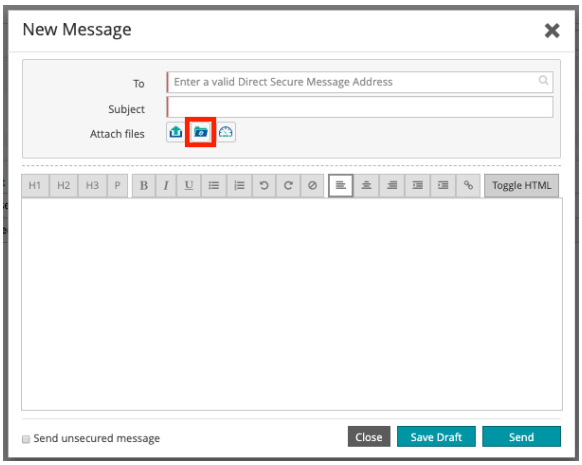
Then, enter a subject for the message in the Subject field.



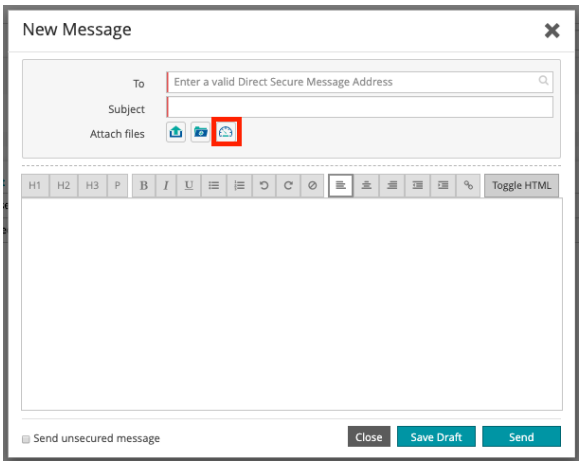
To attach the relevant lab results, select one of the icons to the right of the Attach Files field. Click the upload icon to upload a document located on a personal computer.



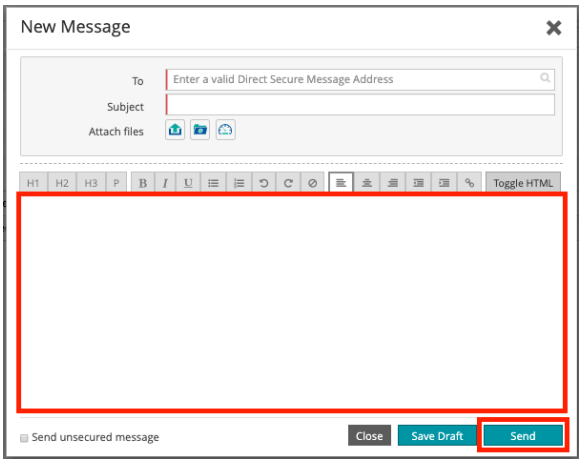
Click the file folder icon to upload a document that is located in the *My Health Files* section of Florida Health Connect.



Select the speedometer icon to upload data from the following Florida Health Connect sections: *Allergies*, *Conditions*, *Laboratory Results*, *Medication*, *Vital Signs, Care Plan devices, Family History, Goals, Health concerns, Immunizations, Procedures, Radiology results, Visits and Social History.*



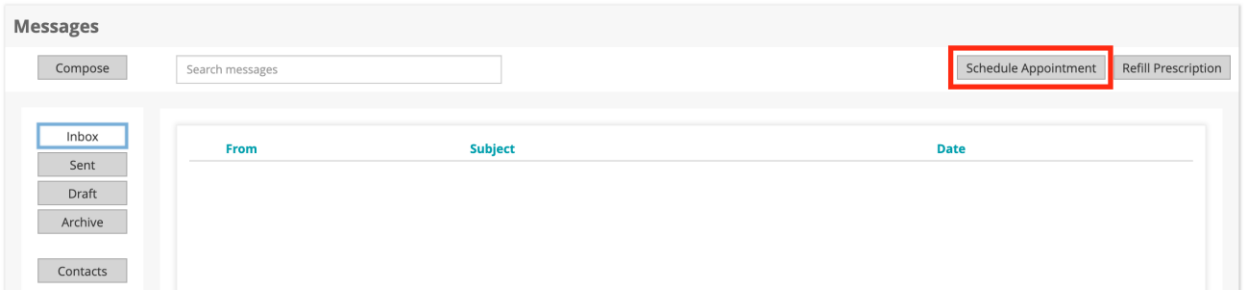
Compose the message to the recipient and click '***Send***.'



Send New Appointment Message

Use Case: User wants to send a message to schedule a new appointment with their healthcare provider.

Click the '***My Messages***' button on the **teal** sidebar. Then, click on '***New appointment***' in the top toolbar.

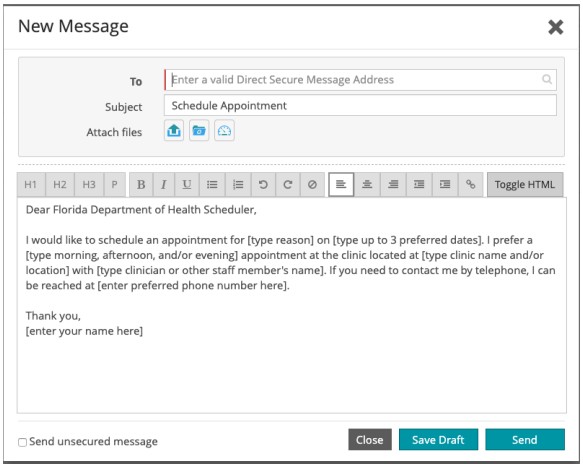


Select a provider for the requested appointment.

In the To field, type in the provider's name. If the recipient is not already a saved contact, either type the provider's full email address or proceed to add the provider as a contact as demonstrated in the *Add/Edit Contacts* section. If the recipient is a saved contact, the field will auto-populate.

Then, enter a subject for the message in the Subject field.

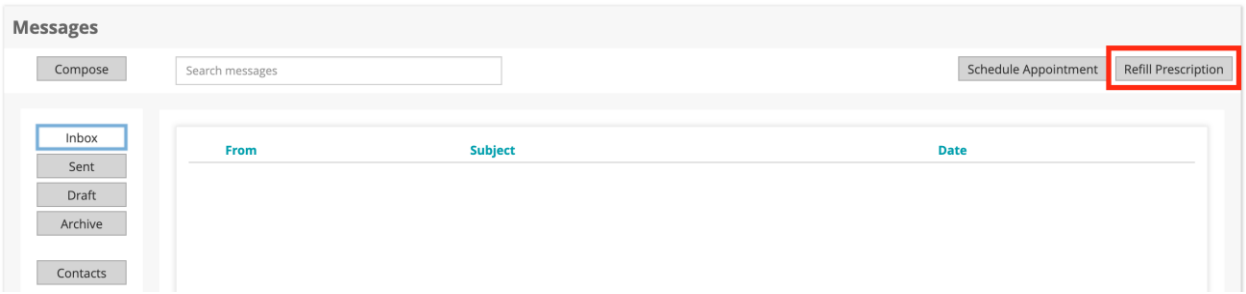
In the email message, enter the health provider's name, the requested appointment date, and the reason for the appointment. Click '***Send***.'



Refill Prescription

Use Case: User wants to send a message to request a prescription refill from their healthcare provider.

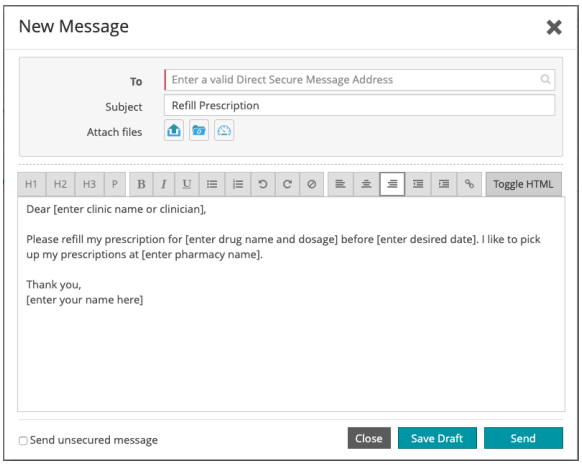
Navigate to the '***My Messages***' button in the teal sidebar. Click the gray '***Refill Prescription***' button on the top toolbar.



In the To field, type in the provider's name. If the recipient is not already a saved contact, either type the provider's full email address or proceed to add the provider as a contact as demonstrated in the *Add/Edit Contacts* section. If the recipient is a saved contact, the field will auto-populate.

Then, enter a subject for the message in the Subject field.

In the email message, enter the healthcare provider's name, drug name, and requested refill date the prescription needs to be filled by the requested appointment date, and the reason for the appointment. Add any other pertinent information that may be useful for the provider. Click '***Send***.'

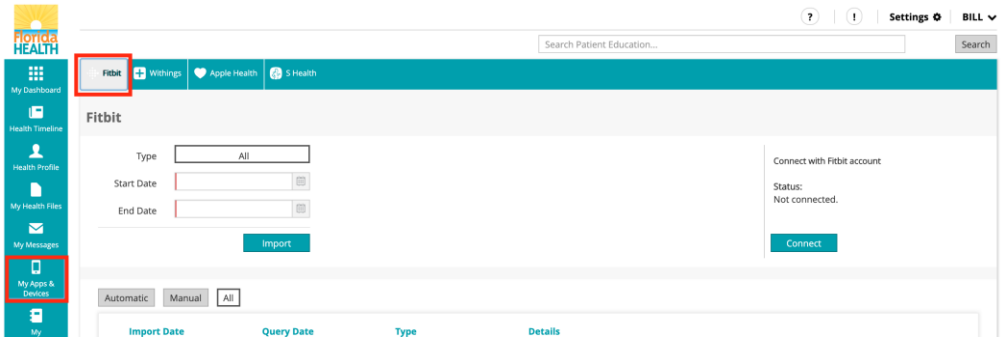


My Apps & Devices

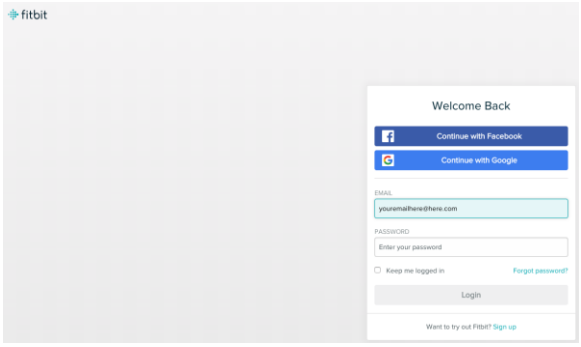
You can set up integrations to third party devices and applications by clicking on '***My Apps and Devices***' in the **teal** sidebar. This feature allows users to add add activity trackers, scales, blood pressure monitors, etc.

Setup Fitbit integration

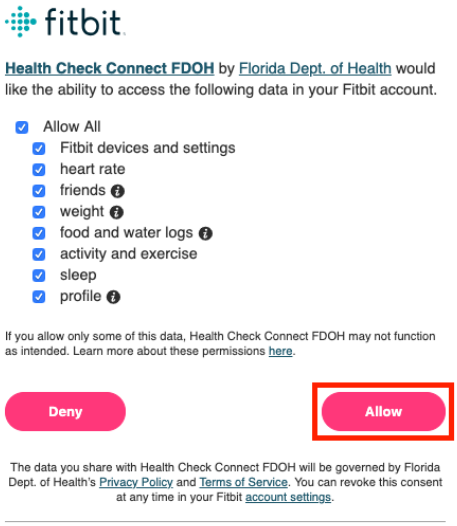
On the *My Apps & Devices* page, with the Fitbit tab active, find and select the Connect bottom.



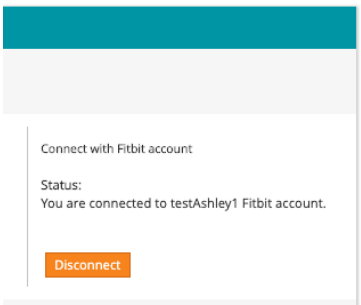
The browser will open the Fitbit login page. Enter your credentials, then select the LOG IN button.



The Fitbit website will open a dialog asking you which measurements you wish to share with Florida Health Connect. Make your selection (or accept the default, leaving all boxes checked) then select the Allow button.



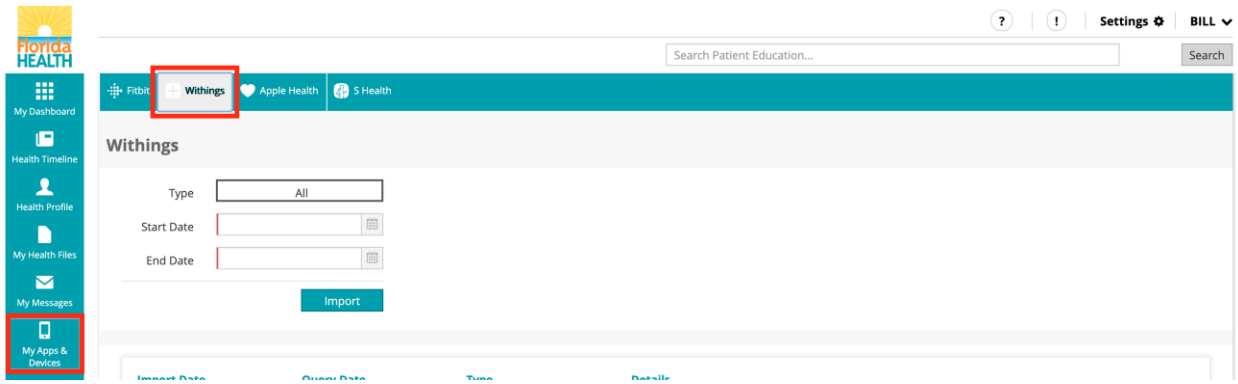
The system returns you to the ***My Apps & Devices*** page. The Fitbit tab remains selected. A message reads "You are now connected to… Fitbit account"



Thereafter, your Florida Health Connect account will receive Fitbit updates through the day.

Setup Withings integration

On the *My Apps & Devices* page, with the Withings tab active, populate a 'Start Date' and 'End Date' and click Import

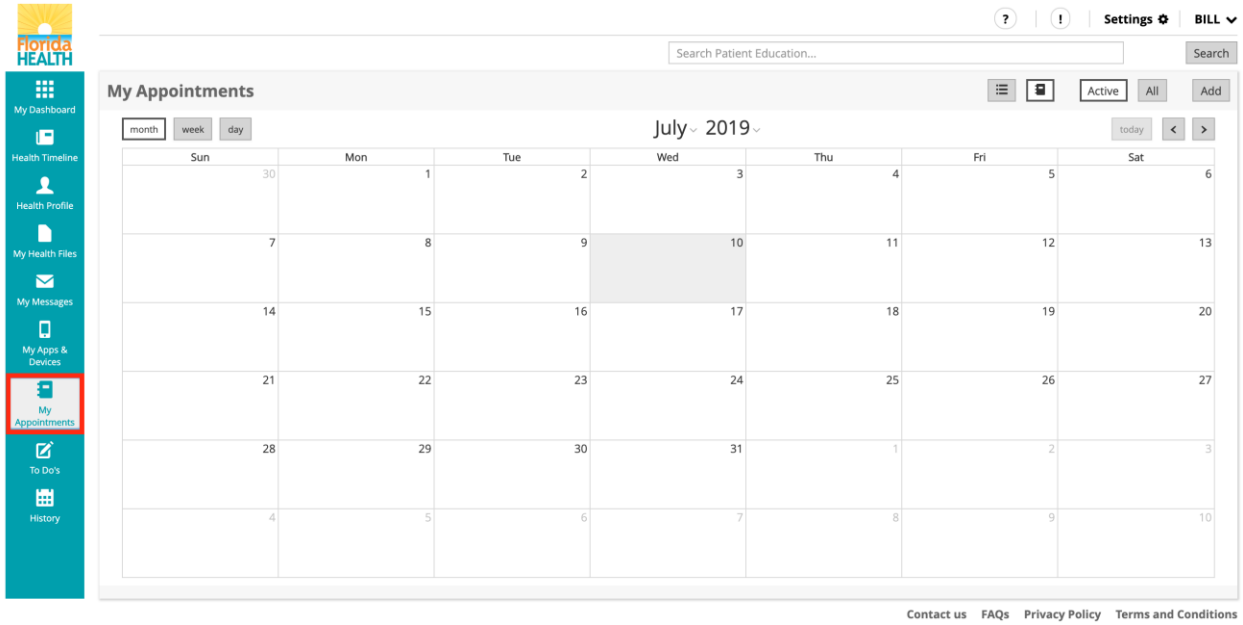


The Withings website will open a dialog asking you to 'Allow this app' to have access to your account to import data. Select 'Allow this app' and the data for the date range selected will populate.

My Appointments

The Appointments function can be accessed from any Florida Health Connect page by clicking on '***My Appointments***' in the **teal** sidebar. This feature allows users to add an appointment to their calendar, as well as any relevant details about the event.

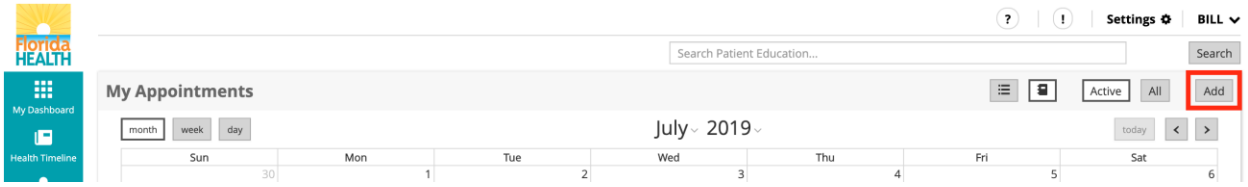
The *My Appointments* page can be viewed as a list or calendar (with monthly, weekly, or daily view options). To toggle between these views, click the list or calendar icons at the top right of the page.



Add Appointment

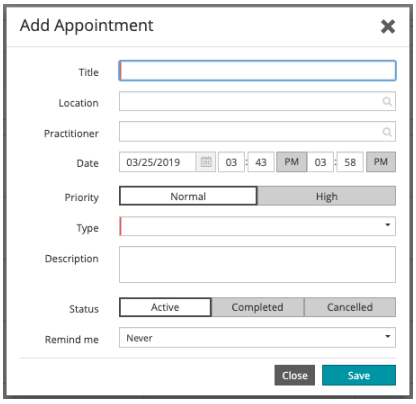
Use Case: User wants to add appointments to their calendar.

To add a new appointment from the calendar view or list view, click the '***Add***' button at the top right of the page.



Alternatively, from the *Monthly* calendar view, create a new appointment by double clicking the day (or hour, if in the *Daily* view) on which the event will take place.

Once the appointment pop-up window appears, enter in the relevant information and click '***Save***' to create the event. The Title, Type, Date, and Status fields are required; the appointment will not be saved if these fields are not completed.



Insert appointment title, provider name, and date of appointment

Enter in the title of the appointment (e.g. "Follow-up for cold" or "Well woman exam") and the provider's name in the Title and Practitioner fields, respectively. For the Date field, either type in the date or click the calendar icon and choose the day from a monthly calendar. Then, enter in the time of the appointment, clicking the AM/PM button to toggle between the two.

Set priority level

All appointments will default to ***'Normal'***, but there is an option to flag an important appointment by clicking ***'High'*** for the *Priority* field. This will cause a red exclamation point to appear next to the appointment in the list/calendar view of appointments.

Set type of appointment

As shown in the list below, there are several options for categorizing the appointment. Choose the appointment category by clicking the down arrow, or anywhere within the Type field.

- Check-Up
- Emergency
- Follow-up
- Routine
- Walk-In

Insert description of appointment

Add any other relevant information in the Description field.

Select a status

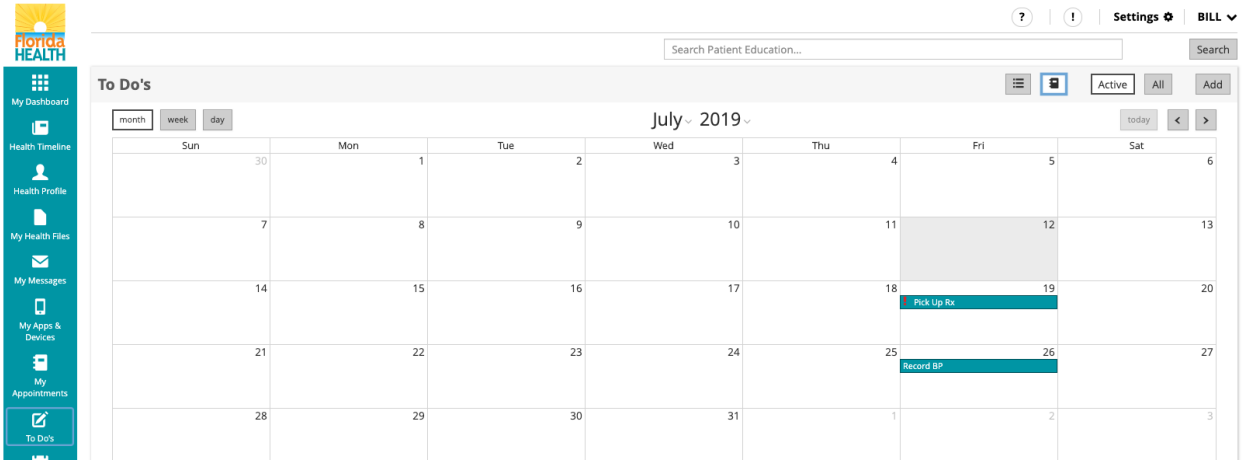
The status of any new appointment will default to Active**.** To change the status to Completed or Cancelled, click the options in the Status field. Any past appointment that is not marked as Completed will automatically be marked “overdue” by Florida Health Connect.

To Dos

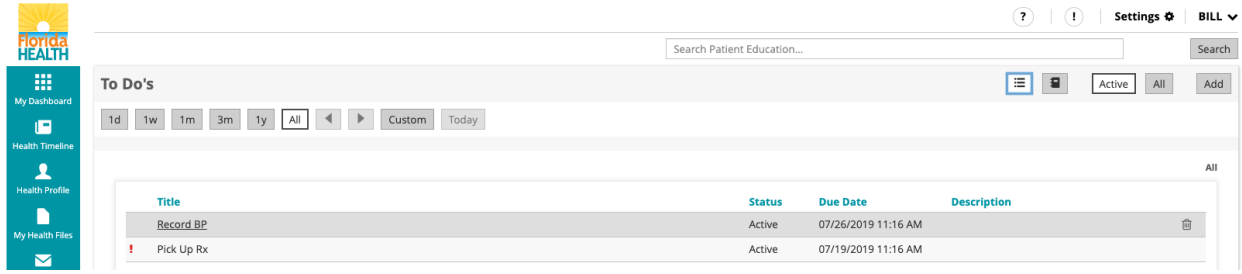
The To Do's function can be accessed from any Florida Health Connect page by clicking on '***To Do's***' in the **teal** sidebar. This feature allows users to manage action items ("To Do" items). The items appear on a To Do calendar, as well as any relevant details about the event.

The *To Do's* page can be viewed as a list or calendar (with monthly, weekly, or daily view options). To toggle between these views, click the list or calendar icons at the top right of the page.

Calendar view of three To Do items:



List view of the same To Do items:

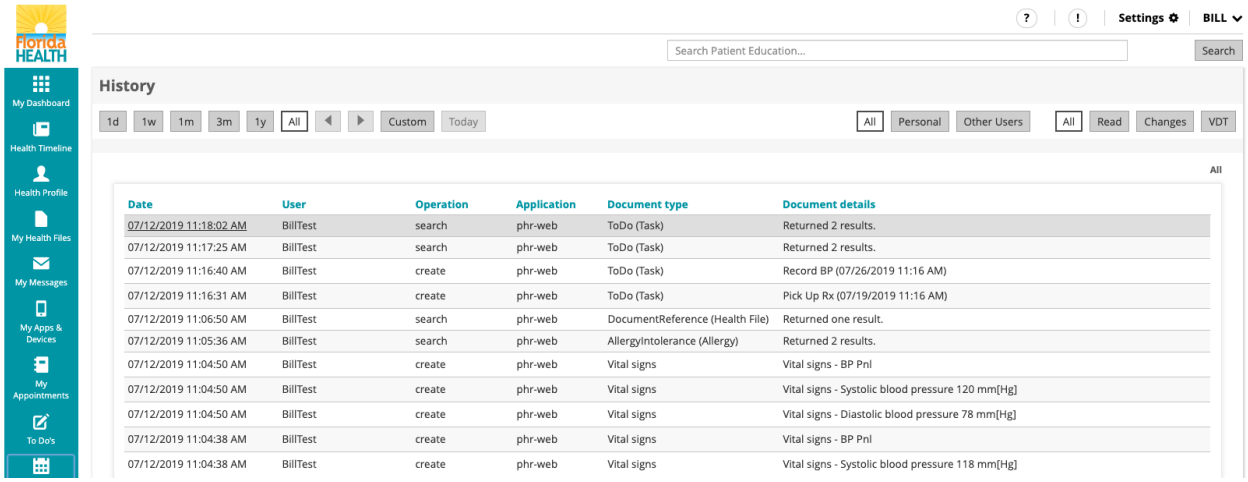


History

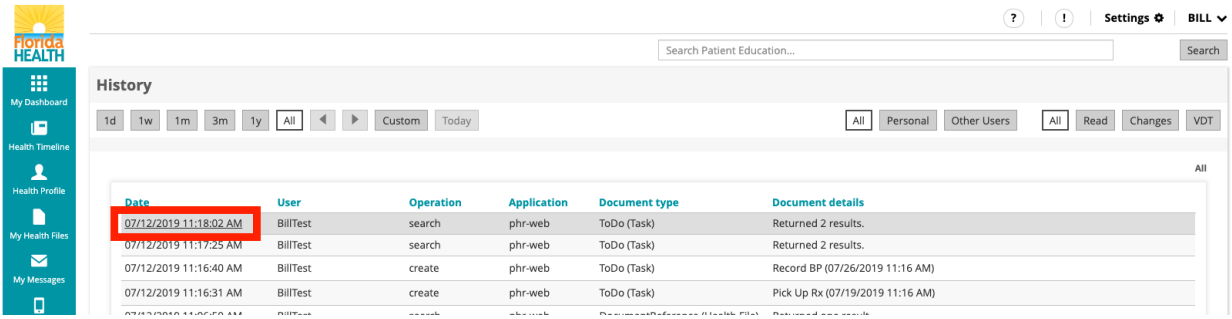
Access Usage History

Use Case: User wants to view a log of who has accessed their health files, and when, as well as other actions taken on the platform (e.g. sending messages, receiving files, and adding records).

From any page in Florida Health Connect, navigate to the *History* page by clicking the calendar icon on the **teal** sidebar.



To view more details about an action taken on the platform, click row of each entry. Certain history have details but not all.

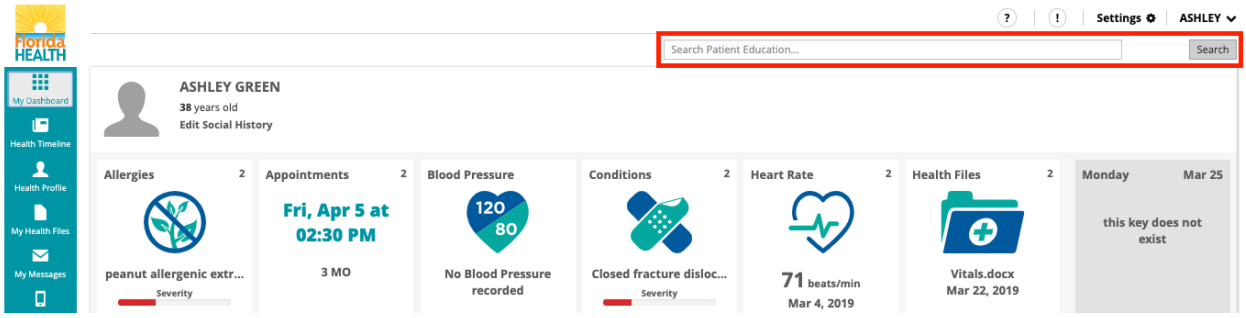


To exit the *History Details* pop-up window, click either the '***X***' at the top right corner of the window, or the ***'Close***' button at the bottom right.

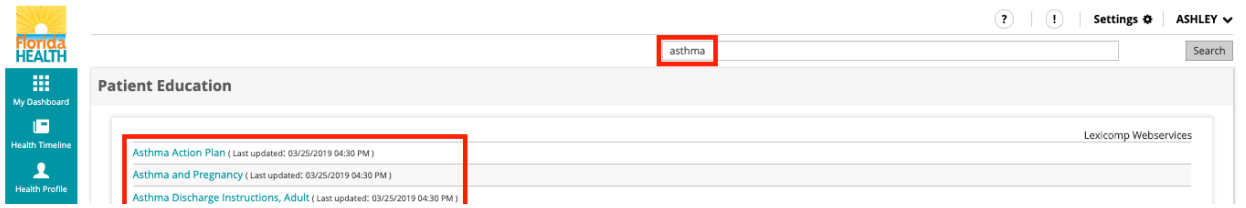
Patient Education

At the top right of each page of the site, users can search for health-related topics.

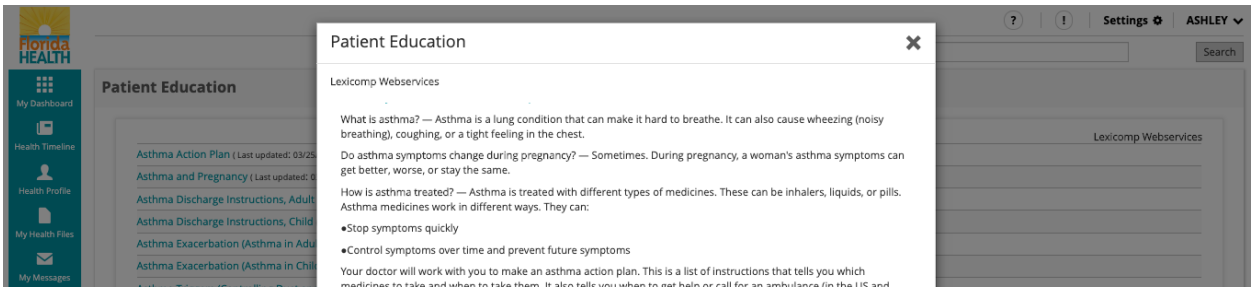
In the Search Patient Education field, type in a health topic. Click ***'Search'***.



Search results will include a list of educational materials related to the search keyword(s).



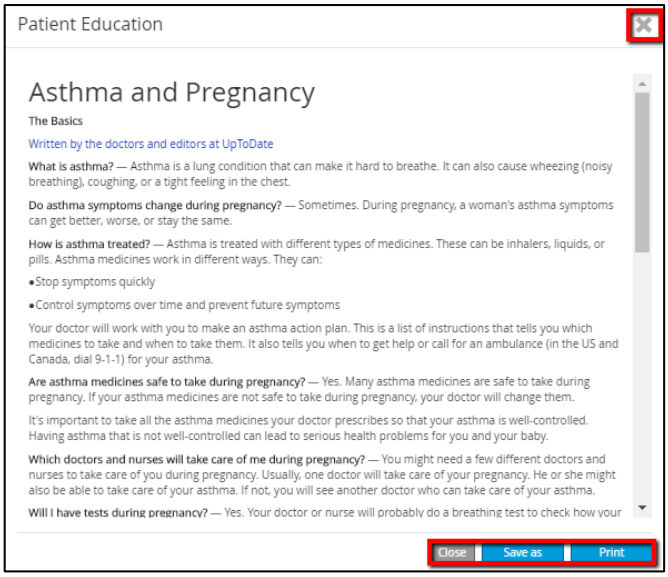
Click the desired search result and a pop-up window will appear.



To save the article, click the '***Save As***' button on the bottom of the pop-up window.

To print the article, select the '***Print***' button on the bottom of the pop-up window.

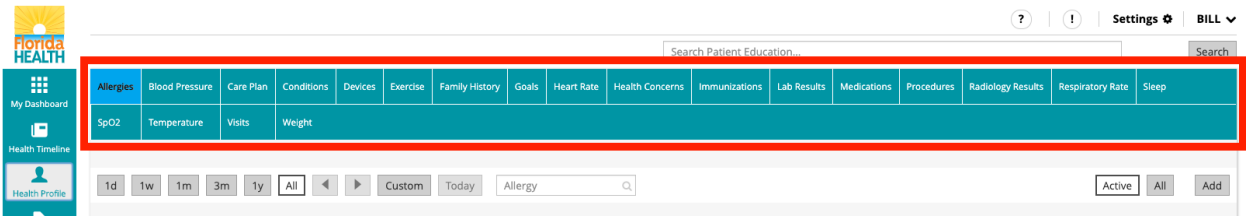
To close the pop-up window, click the '***X***' on the top right of the pop-up window or the '***Close***' button at the bottom of the pop-up window.



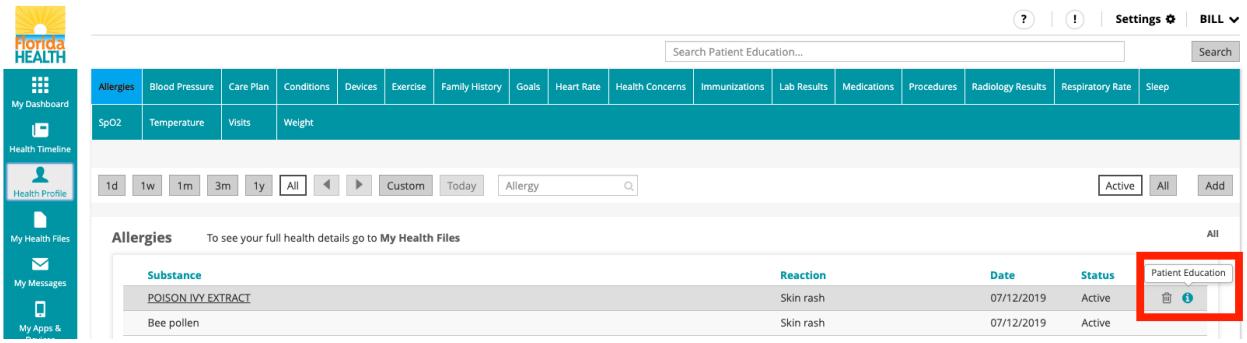
Tailored Education

Use Case: User wants to learn more about recommended surgery and health maintenance tips based on lab results and medications.

Select ***'Health Profile'*** from the **teal** sidebar. In the **teal** menu at the top of the *Health Profile* section, click ***'Allergies'***, ***'Conditions'***, ***'Medications'***, ***'Lab Results'***, '***Immunizations'*** *or* ***'Procedures'***.



To the right side of each entry is an information icon. Click the '***i***' to bring up pertinent health recommendations and information.



Revision History	
7/12/19	Updated screenshots